ORGANIZER Page 1 2022 1040 US Tax Organizer Tax Return Appointment **Accel Tax & Business Services, LLC** 235 Magrath Darby Blvd., Suite 150 Date: Mt. Pleasant SC 29464 Time: Telephone number: (843) 972-0536 Location: Fax number: (843) 972-0539 E-mail address: info@acceltaxandbusiness.com This tax organizer will assist you in gathering information necessary for the preparation of your 2022 tax return. Please enter all pertinent 2022 information. NOTE: If you claim the earned income credit, please provide proof that your child is a resident of the United States. This proof is typically in the form of: school records or statement, landlord or property management statement, health care provider statement, medical records, child care provider records, placement agency statement, social service records or statement, place of worship, Indian tribal office statement, or employer statement. NOTE: If your child is disabled, please provide one of the following forms of proof of disability: doctor statement, other health care provider statement, or social services agency or program statement. CLIENT INFORMATION Taxpayer First name and initial.... Last name..... Title/suffix..... Social security number... Occupation..... Date of birth (m/d/y).... Date of death (m/d/y).... 1=blind..... Home phone..... Work phone..... Work extension.... Cell phone..... E-mail address... In care of..... Street address.... Apartment number. Address City. . . . . . . . . . . . . . . . . State..... ZIP code..... **DEPENDENTS** Dependent No. Dependent No. First name....... Last name..... Title/suffix..... Date of birth (m/d/y).... Date of death (m/d/y) .... Date of adoption (m/d/y) . Social security number... Relationship..... Months lived at home... Dependent No. Dependent No. First name..... Last name..... Title/suffix..... Date of birth (m/d/y)....

Date of death (m/d/y) ....

Date of adoption (m/d/y) ...

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Relationship .....

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ORGANIZER 2022 1040 US Tax Organizer MISCELLANEOUS INCOME Taxpayer: Alimony received Spouse: Alimony received Other: RETIREMENT PLAN CONTRIBUTIONS 2022 Amount 2021 Amount Taxpayer: Traditional IRA contributions (1=maximum)..... Roth IRA contributions (1=maximum)..... Self-employed, SEP, SIMPLE, & qualified plan contributions (1=maximum) . . . . . Spouse: Roth IRA contributions (1=maximum)..... Self-employed, SEP, SIMPLE, & qualified plan contributions (1=maximum) . . . . . OTHER GOVERNMENT FORMS - DEDUCTIONS Attach Forms 1098 AFFORDABLE CARE ACT Form 1095-A - Health Insurance Marketplace Statement Attach Forms 1095 Form 1095- B - Health Coverage ..... Form 1095-C - Employer-Provided Health Insurance Offer and Coverage . . . . . ADJUSTMENTS TO INCOME Taxpayer: Educator expenses..... Other adjustments to income: Spouse: Educator expenses... Other adjustments to income: MEDICAL AND DENTAL EXPENSES Prescription medicines and drugs ...... Doctors, dentists and nurses..... Insurance premiums..... Insurance reimbursement..... Number of medical miles..... Other: TAXES PAID State income taxes - 1/22 payment on 2021 state estimate

ORGANIZER 2022 1040 US Tax Organizer TAXES PAID (continued) 2022 Amount 2021 Amount State income taxes - paid with 2021 state extension State income taxes - paid with 2021 state return State income taxes - paid for prior years and/or to other states City/local income taxes - 1/22 payment on 2021 city/local estimate City/local income taxes - paid with 2021 city/local extension City/local income taxes - paid with 2021 city/local return State and local sales taxes (except autos and special items) ..... Use taxes paid on 2022 purchases Use taxes paid on 2021 state return Sales tax on autos not included above... Sales taxes paid on boats, aircraft, and other special items ..... Foreign income taxes..... Attach Tax Notice Personal property taxes (including automobile fees in some states) . . . . INTEREST PAID Home mortgage interest and points paid: Attach Forms 1098 Home mortgage interest not on Form 1098 (include name, SSN, & address of payee): Points not reported on Form 1098: Investment interest (interest on margin accounts): Passive interest..... CASH CONTRIBUTIONS NOTE: No deduction is allowed for cash or check contributions unless the donor maintains a bank record, or a written communication from the donee, showing the name of the organization, contribution date(s), and contribution amount(s) Volunteer expenses (out-of-pocket)..... Number of charitable miles..... NONCASH CONTRIBUTIONS NOTE: No deduction is allowed for contributions of clothing and household items that are not in good used condition or better, in addition, a deduction for any item with minimal monetary value may be denied. MISCELLANEOUS DEDUCTIONS Tax return preparation fee..... Safe deposit box rental..... Investment expenses. Estate tax, section 691(c)..... Unreimbursed employee expenses: Other:

ORGANIZER Page 5

2022	1040	US	Miscellaneous Questions				
If any of the following items pertain to you or your spouse for 2022, please check the appropriate box and provide additional information if necessary.							
YES	NO	Did your r	marital status change during the year?				
		Did your a	address change during the year?				
		Could you	be claimed as a dependent on another person's tax return?				
		Were ther	re any changes in dependents?				
		Did you a	nd your dependents have health care coverage for the full-year?				
		Did you re	eceive an IRS document 1095-A (Health Insurance Marketplace Statement)? If so, please attach.				
		Did you re	eceive unreported tip income of \$20 or more in any month?				
		Did you re	eceive any disability income?				
		Did you b	uy or sell any stocks, bonds or other investment property?				
		Did you p	urchase, sell, or refinance your principal home or second home, or did you take a home equity loan?				
		Did you m energy so	nake any residential energy-efficient improvements or purchases involving solar, wind, geothermal or fuel cell ources?				
		Did you re	eceive a distribution from or make a contribution to a retirement plan (401(k), IRA, etc.)?				
		Did you tr	ransfer or rollover any amount from one retirement plan to another?				
		Did you co	onvert part or all of your traditional/SEP/SIMPLE IRA to a Roth IRA?				
		Did you, y vocationa	your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or I school?				
		Did you ir	ncur a loss because of damaged or stolen property?				
		Did you u	se your car on the job (other than to and from work)?				
		May the II	RS discuss your tax return with your preparer?				
		Was your	home rented out or used for business?				
		Were you	notified or audited by either the IRS or the State taxing agency?				
		Did you re	eceive an economic impact payment? If so, how much?				

22	1040	US	Business Income (Schedule C)	No 10
		l	<u>'</u>	
	Please en	iter all pert	inent 2022 amounts. Last year's amounts are provid	led for your reference.
GEN	IERAL IN	IFORMA <sup>-</sup>	TION	
Princip	pal business (	code		
Busine	ess name, if o	different from	Form 1040	
Busine	ess address, i	if different from	m Form 1040	
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			)	
			1040	
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Other	accounting m	nethod		
Δ	matin more entre	. 1		
			ver cost/market, 3=other	
	,			
	-		usiness	
If requir	red to file Form(s	s) 1099, did you o	r will you file all required Form(s) 1099: 1=yes, 2=no	
1=not	subject to se	lf-employment	t tax	
			erial income producing factor	
			company	
			r commodities	
	OME		2022 Amount	2021 Amount
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Other	income:			
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COS	ST OF GO	OODS SO	LD	
Invent	ory at beginn	ing of the yea	r	
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Page 7

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2022	1040	US	Business Income (Schedule C) (cont.)	No.	16 p2

XPENSES	2022 Amount	2021 Amount
ccounting		
dvertising		
nswering service		
ad debts from sales or service		
ank charges		
ar and truck expenses (not entered elsewhere)		
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ontract labor		
elivery and freight		
ues and subscriptions		
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surance (other than health)		
ortgage interest (paid to banks, etc.)		
ther interest (not entered elsewhere)		
anitorial.		
aundry and cleaning.		
egal and professional		
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ension and profit sharing plans - contributions		
ension and profit sharing plans - admin. and education costs		
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ent - vehicles, machinery, & equipment (not entered elsewhere)		
ent - other		
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upplies		
axes - real estate		
axes - payroll		
axes - sales tax included in gross receipts		
axes - other (not entered elsewhere)		
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otal meals in full (50%)		
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ORGANIZER Page 8

22 1040				
	US	Rental & Royalty Incor	me (Schedule E)	No 1
Please en	ter all pert	inent 2022 amounts. Last year's	amounts are provided for	your reference.
GENERAL IN	IFORMA	ΓΙΟΝ	2022 Amount	2021 Amount
Description of prope	erty			Type of Property
Street address				
City				1 = Single Family Residence 2 = Multi-Family Residence
State				3 = Vacation/Short-Term Renta
ZIP code				4 = Commercial 5 = Land
Type of property (se	ee table)			6 = Royalties
Other type of prope	erty			7 = Self-Rental
Number of days ren	nted		34	
Percentage of ownership if not 100% (.xxxx)		1=	did not actively participate	
Percentage of tenant occu if not 100% (.xxxx)	upancy	1=	real estate professional	
1=spouse, 2=joint.			rental other than real estate	
1=qualified joint ver		1=	investment	
1=nonpassive activity, 2=passive royalty		1=S	ingle member limited	
		id you or will you file all required Form(s)	· · ·	
INCOME			2022 Amount	2021 Amount
Rents or royalties re	eceived			2021 Amount
Cleaning and maint	enance	where)		
Commissions				
· ·				
• .				
· ·				
		-1-2		
Mortgage Interest (p		etc.)		
Qualified		millima		
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ORGANIZER Page 9

022	1040	US	Rental & Royalty Incom	e (Sch. E) (cont.)	No.	18 <sub>p2</sub>			
Pleas e	Please enter all pertinent 2022 amounts. Last year's amounts are provided for your reference. The indirect expense column should only be used for vacation homes or less than 100% tenant occupied rentals.								
GEN	NERAL IN	IFORMA <sup>T</sup>	ΓΙΟΝ						
Foreig	n postal code	9							
OIL	AND GA	S		2022 Amazant	2021 A				
Produ Cost o Perce State	ction type (pr depletion ntage depletion cost depletion	eparer use on on rate or amo	bunt	2022 Amount	2021 Amoui	<u> </u>			
PER	RSONAL	USE OF I	DWELLING UNIT (INCLUDING	VACATION HOME)					
Numb	er of days pe	rsonal use	al method elected)						
IND	IDECT E	XPENSES							
			ated to operating or maintaining the dwelling usurance, and utilities.	unit.					
	,		where)						
	•								
Legal	and profession	nal fees							
Licens	ses and perm	its							
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Painti	ng and decor	ating							
			nere)						
Other:									
			_						