

NAMES as listed on Social Security Card		Date of Birth	Social Security #	Occupation	Status: <input type="checkbox"/> Single <input type="checkbox"/> Married Filing Jointly <input type="checkbox"/> Married Filing Separately <input type="checkbox"/> Head of Household <input type="checkbox"/> Widow(er) with dependent
Taxpayer					
Spouse					
Address					
Phone					

Mail Check ___ or Direct Deposit Account # _____ Bank RT# _____ Checking ___ or Savings ___

DEPENDENTS – List names of all dependents who received more than half of their support from you.					Months in your home in 2022	Full Time Student 5 months or more?
Name of Dependents	Date of Birth	Relationship	Social Security #			

WAGE INCOME - Please bring all W-2 Forms provided by your employer(s).								Retirement (401K)	Taxpayer or Spouse
Employer	State	Gross wages	Federal w/h	SS w/h	Med w/h		State w/h		

RETIREMENT INCOME - Please bring all 1099-R Forms provided.						Do you receive VA disability benefits? Y___ N___		Taxpayer or Spouse
Name of Payer	Gross diistribution	Taxable distribution	code	Federal w/h	State w/h	State		

SOCIAL SECURITY - Please bring all 1099-SSA Forms				Taxpayer or Spouse
Net Benefits (box 5)	Medicare Premiums paid	Federal w/h	Adjustments / Repayments	

INTEREST INCOME - Please bring all 1099-INT Forms you received			
Name of Payer	Savings Bonds / Federal Obligations	Amount Reported	federal withholding

DIVIDEND INCOME - Please bring all 1099 Forms you received					
Name of Payer	Ordinary dividends	Qualified dividends	Capital gain distr.	Other	federal withholding

OTHER INCOME – Please bring all 1099 Forms and Schedule K-1's		Amount	federal withholding
Unemployment Compensation			
Prizes and Awards			
Alimony Received			
Tax Refunds (State and Local)			
Commissions and Fees			
Other			

STOCK OR PROPERTY SALES —Please bring broker statements. Form 1099-B, or Real Estate transaction papers.

Name of Stock or Property Description	Number of Shares	Date Acquired	Date Sold	Sales Price	Cost or Other Basis	Expense of Sale	Depreciation or Depletion

RENTAL AND ROYALTY INCOME AND DEDUCTIONS

	Property A	Property B	Property C	Property D
Type of Property				
Property Location				
Rental Income				
Royalty Income				
Advertising				
Auto and Travel				
Cleaning and Maintenance				
Commissions				
Insurance				
Professional Fees				
Management Fees				
Mortgage Interest Paid				
Other Interest				
Repairs				
Supplies				
Taxes				
Utilities				
Depreciation (discuss with tax consultant)				
Other				

BUSINESS or FARM INCOME AND EXPENSES Business name _____

EIN _____

INCOME description	Amount

EXPENSES	Amount	Amount
Advertising		Veterinary Fees, Medicine
Cell Phone		Legal and Professional Services
Car and Truck Expenses (mileage record required)		Office Expenses
Commissions		Pension / Profit Sharing Plans
Depletion		Interest:
Depreciation (discuss with tax consultant)		Bank Loans
Employee Benefit Program		Credit Cards
Insurance		Vehicle Loans
Chemicals		Other
Conservation Expenses		Other
Custom Hire, Sub Contractors		Rent or Lease:
Feed Purchased		Machinery & Equipment
Fertilizers and Lime		Other (Land, Animals, etc.)
Freight, Trucking		Other Business Property
Gasoline, Fuel, Oil		Other
Supplies		Cost of Goods Sold:
Travel		Inventory (Beginning of Year)
Meals		Purchases of Goods
Utilities & Telephone		Inventory (End of Year)
Wages		Other Expenses:
Repairs, Maintenance		
Seed, Plants Purchased		
Storage, Warehousing		

At any time during 2022 did you have a financial interest in or signature authority over a financial account (such as a bank account, securities account, or brokerage account) located in a foreign country?

At any time during 2022, did you receive, sell, send, exchange or otherwise acquire any financial interest in any virtual currency?

For virtual currency transactions (sales / exchanges) include exchange company statement (IRS form 8949) or a comprehensive spreadsheet with currency description, quantity, purchase date, purchase cost, sale date, sale cost.

Mining, staking, rewards received are all considered self-employment income subject to self-employment tax.

If you received Health Insurance through the Marketplace / Healthcare.gov bring your Form 1095-A

COLLEGE TUITION bring Form 1098T issued by the school

Name of Student	School name, state & county	Year in school	Amount of tuition & required fees paid to college	books, required equipment
		Fr So Jr Sr Other	\$	\$
		Fr So Jr Sr Other	\$	\$

CHILD & DEPENDENT CARE

Child's name	Qualifying Care Provider's Name	Provider's Address	Provider's ID#	Amount

DEDUCTIONS – MISCELLANEOUS

	Amount
Alimony Paid recipient's name and SSN Date of Divorce	
CD or Savings Penalty for Premature Withdrawal	

DEDUCTIONS – MEDICAL AND DENTAL EXPENSES

	Unreimbursed Amount	Taxpayer	Spouse
Prescription Drugs and Insulin			
Doctors and Dentists			
Hospitals			
Nursing Home			
Insurance Premiums you Paid for Medical, Dental Vision coverage (not thru payroll or SSA deduction)			
Long Term Care Insurance			
Transportation Expense or Vehicle Miles for Medical Purposes			
Other (List below - including hearing aids, dentures, eyeglasses, braces, wheelchairs, etc.)			

DEDUCTIONS – INTEREST

	Amount
Home Mortgage Interest paid to Financial Institutions (Form 1098)	
Home Mortgage Interest paid to Individuals (show name, address and social sec. number)	
Interest on 2 nd home (include RV or Boat if living accommodations are built in)	
Principal Mortgage Insurance (PMI)	

DEDUCTIONS – TAX PAID in 2022

	Amount
Real Estate Tax paid	
Personal Property Tax paid	
State income tax paid in 2021 for prior year tax return	
Sales Tax paid on large items: cars, boats, RV	

HEALTH SAVINGS ACCOUNT

	Amount
HSA contributions made (from after-tax \$\$ - not through payroll)	
HSA distributions taken (reported on Form 1099-SA)	

RESIDENTIAL ENERGY CREDITS

Type of EnergyStar qualified improvement (windows, doors, insulation, air conditioner, furnace, solar panels, etc.)	Purchase Amount

<https://www.energystar.gov/>

DEDUCTIONS – CONTRIBUTIONS details may be required – receipts must be available in case of audit

Cash – name of charity	Amount	Non-Cash - name of charity & description of item(s)	Date	Amount

IRA/SEP Contributions

Date	Roth or Traditional	Taxpayer Amount	Spouse Amount

Roth IRA Conversions to Traditional IRA Taxpayer

Date	Transferred from:	Transferred to:	Amount	Or Spouse

Estimated Taxes Paid & 2021 Refunds Credited to 2022

Federal		State	
Date Paid	Amount	Date Paid	Amount

Did you claim a \$7,500 first-time homebuyer credit on your 2008 return? Yes ___ No ___ How much have you repaid \$ _____

Salvation Army Valuation Guide www.salvationarmyusa.org

LADIES' CLOTHING	low range	high range
blouse	\$2.50	\$12.00
bathrobes	\$2.50	\$12.00
boots	\$2.00	\$5.00
bathing suits	\$4.00	\$12.00
coats	\$10.00	\$40.00
dresses	\$4.00	\$20.00
evening dresses	\$10.00	\$60.00
fur hats	\$7.00	\$15.00
fur coats	\$25.00	\$400.00
handbags	\$2.00	\$20.00
hats	\$1.00	\$8.00
jackets	\$4.00	\$12.00
nightgowns	\$4.00	\$12.00
pant suits	\$6.50	\$25.00
socks	\$0.50	\$1.25
suits	\$6.00	\$25.00
shoes	\$2.00	\$25.00
skirts	\$3.00	\$8.00
sweaters	\$3.75	\$15.00
slips	\$1.00	\$6.00
slacks	\$3.50	\$12.00
MEN'S CLOTHING	low range	high range
jackets	\$7.50	\$25.00
over coats	\$15.00	\$60.00
pajamas	\$2.00	\$8.00
pants - shorts	\$3.50	\$10.00
raincoats	\$5.00	\$20.00
suits	\$15.00	\$60.00
slacks	\$5.00	\$12.00
shirts	\$2.50	\$12.00
sweaters	\$2.50	\$12.00
shoes	\$4.20	\$30.00
swim trunks	\$2.50	\$8.00
tuxedo	\$10.00	\$60.00
under-shirts	\$1.00	\$3.00
belts - ties	\$1.00	\$8.00
SPORTING GOODS	low range	high range
bicycles	\$5.00	\$75.00
fishing rods	\$6.00	\$30.00
golf clubs	\$2.00	\$25.00
ice / roller skates	\$3.00	\$15.00
luggage	\$5.00	\$15.00
skis	\$15.00	\$100.00
sleds	\$6.00	\$24.00
tennis rackets	\$5.00	\$40.00

FURNITURE	low range	high range
air conditioner	\$20.00	\$90.00
bar stools	\$12.00	\$24.00
bed full, queen, king complete	\$50.00	\$170.00
bed (single) complete	\$35.00	\$100.00
bedroom set complete	\$250.00	\$1,000.00
bicycles	\$15.00	\$75.00
chest	\$25.00	\$95.00
china cabinet	\$85.00	\$300.00
convertible sofa (w/ mattress)	\$50.00	\$300.00
crib (w/ mattress)	\$25.00	\$100.00
chair (upholstered)	\$25.00	\$100.00
coffee table	\$15.00	\$65.00
dresser w/ mirror	\$20.00	\$100.00
desk	\$25.00	\$140.00
dryer	\$45.00	\$90.00
electric stove (working)	\$75.00	\$150.00
end tables (2)	\$10.00	\$50.00
lamp	\$5.00	\$50.00
fireplace set	\$15.00	\$60.00
floor lamps	\$6.00	\$55.00
folding beds	\$20.00	\$60.00
gas stoves	\$50.00	\$125.00
heaters	\$7.50	\$22.00
high chair	\$12.00	\$60.00
kitchen table	\$25.00	\$70.00
kitchen cabinets	\$25.00	\$75.00
kitchen chair	\$2.50	\$10.00
kitchen set	\$35.00	\$170.00
mattress (double)	\$7.00	\$30.00
mattress (single)	\$5.00	\$20.00
microwave	\$10.00	\$50.00
piano	\$3.00	\$240.00
pictures and paintings	\$6.00	\$48.00
ping pong tables	\$18.00	\$48.00
pool tables	\$24.00	\$90.00
rugs	\$4.00	\$108.00
refrigerator (working)	\$90.00	\$300.00
pool tables	\$24.00	\$90.00
sofa	\$35.00	\$200.00
stroller	\$6.00	\$50.00
TV color (working)	\$75.00	\$225.00
trunk	\$5.00	\$70.00
wardrobe	\$20.00	\$100.00
washer (working)	\$40.00	\$150.00

CHILDREN'S CLOTHING	low range	high range
blouses	\$2.00	\$8.00
boots	\$3.00	\$20.00
coats	\$4.50	\$20.00
dresses	\$3.50	\$12.00
jackets	\$3.00	\$25.00
jeans	\$3.50	\$12.00
pants	\$2.50	\$12.00
snowsuits	\$4.00	\$19.00
shoes	\$2.50	\$8.75
skirts	\$1.50	\$6.00
sweaters	\$2.50	\$8.00
slacks	\$2.00	\$8.00
shirts	\$2.00	\$6.00
socks	\$0.50	\$1.50
Miscellaneous	low range	high range
adding machines	\$5.00	\$50.00
bedspread/quilt	\$3.00	\$24.00
Christmas trees	\$18.00	\$60.00
home computer	\$180.00	\$600.00
mixer	\$5.00	\$20.00
mower	\$12.00	\$120.00
power edger	\$6.00	\$60.00
rototiller	\$30.00	\$108.00
sewing machine	\$18.00	\$90.00
snow blower	\$60.00	\$180.00
vacuum cleaner (working)	\$24.00	\$72.00
wigs	\$6.00	\$30.00
DRY GOODS	low range	high range
bakeware	\$1.00	\$3.00
blankets	\$3.00	\$15.00
chair covers	\$5.00	\$30.00
curtains	\$1.50	\$12.00
drapes	\$6.50	\$40.00
pillows	\$2.00	\$8.00
sheets	\$2.00	\$8.00
throw rugs	\$1.50	\$12.00
towels	\$0.50	\$4.00

All donations must be in good or better condition.

The table includes low and high estimates of value. Consider your item's relative age and quality.

Keep your receipt with your tax return copies.