



Right On The Money LLC

2022 Income Tax Data Organizer

Taxpayers

Name 1: _____	Name 2: _____	
Address: _____	Address: _____	
DOB: _____	Home #: _____	DOB: _____
SSN: _____	SSN: _____	
Cell: _____	Cell: _____	
Email: _____	Email: _____	

Banking

Bank Name: _____	Account Holder: _____	
Routing Number: _____	Account Number: _____	
	<input type="checkbox"/> Checking <input type="checkbox"/> Savings	
<u>Please select authorized uses for this account.</u>		
Refunds: _____	Tax payments due: _____	Estimates for next tax year: _____

Dependents

Name	Relationship	SSN	DOB

Items to Bring

Income—*You should bring documentation for all income, which may include:*

___ W2s	___ 1099—all types	___ Social Security statement
___ Government Refund	___ K-1s	___ Unemployment statement
___ Gambling Winnings	___ Business Income	___ Rental Income

Health Insurance—*You should bring verification of health insurance, which may include:*

___ 1099-HC	___ 1095-A	___ 1095-B
-------------	------------	------------

Expenses—*You should bring documentation for expenses that may be itemized, which may include:*

___ Property taxes	___ Excise taxes	___ Mortgage Interest (1098)
___ Charitable Donations	___ Business Expenses	___ Rental Property Expenses
___ Medical Expenses	___ Student Loan Interest	

Higher Education

College Attended: _____	Student: _____
Year(s) in College: _____	Full time _____ Part time _____
___ 1098-T	___ Has this student been convicted of a felony?
___ Years AOTC already taken	
College Attended: _____	Student: _____
Year in College: _____	Full time _____ Part time _____
___ 1098-T	___ Has this student been convicted of a felony?
___ Years AOTC already taken	
College Attended: _____	Student: _____
Year in College: _____	Full time _____ Part time _____
___ 1098-T	___ Has this student been convicted of a felony?
___ Years AOTC already taken	

Daycare

Provider: _____	EIN: _____
Address: _____	
Total Paid: _____	Paid For: _____
Provider: _____	EIN: _____
Address: _____	
Total Paid: _____	Paid For: _____

Rent

Landlord's name: _____
Landlord's address: _____
Rent paid: _____

IRS Required

Were you or your spouse a member of the Armed Forces at any time during 2022?	YES	NO
Did you have any interest in or authority over a foreign account or foreign trust?	YES	NO
Did you receive, sell or exchange any virtual currency?	YES	NO