

Name(s) _____ Check here if changed since last year

Best way to reach you? Phone Email Mail

Phone Number to contact you: _____ Secondary Number: _____

Email Address: _____

 Check here if you have any dependents not included on prior year return

We are trying to make sure all your information is updated. We have an info sheet on our website if you can fill out with updated information if anything has changed. We will contact you to verify information when all documents are loaded.

To update your info sheet online go to : <https://www.circletax.com/infosheet.html>

Income Documents

- W-2 Forms from all employers
- 1099-Misc or NEC Forms (contract work over \$600).
- Investment income information 1099-INT, 1099-DIV, 1099-B
- Retirement (1099-R)
- Income from local and state tax refunds from the prior year (only if you previously itemized) (1099-G)
- Business income (Schedule C income/Expenses or K-1)
- Unemployment income (1099-G)--check the state website if you do not receive it via mail
- Rental property income (Schedule E or F Income/Expenses)
- Social Security or Railroad Retirement benefits (1099-SSA or 1099-RRB)
- Health savings account distribution (1099-SA)
- Miscellaneous income (including: alimony received, jury duty, lottery and gambling winnings (W-2G), Form 1099-MISC for prizes and awards, and Form 1099-MSA for distributions from medical savings accounts)

Adjustment Documents

- IRA contributions (might have 5498)
- Student loan interest-Form 1098-E
- Health/Medical Savings Account (HSA/MSA) contributions (Contributions through employer are on W-2)
- Self-employed health insurance amount
- Alimony Paid (including Name and SSN for person paid)

Deduction Documents—Standard deductions are \$12,950 Single, \$19,400 Head of Household, and \$25,900 Married filing Jointly. If you do not have that much in deductions, then you do not need to provide us with these documents.

- Mortgage Interest (Form 1098)
- Real Estate Taxes (usually included on mortgage statement)
- Property taxes on Vehicles
- Charitable contributions—This year you are only allowed to deduct charitable donations if you itemize deductions
- Medical expenses (over 7.5% of your income)

Other Info for Credits

- Education costs (Form 1098-T) plus costs of required books/supplies
- Childcare costs (Name, Address, and SSN/EIN for care provider plus amount paid)

Health Insurance

- Marketplace Form (1095-A)—if you had insurance through the marketplace for any part of 2022 (with or without a subsidy) we need the 1095-A. They most likely mailed it, but it is also available on healthcare.gov website if you have an account. If we do not include this your return will get rejected.**
- Other insurance (1095-B or 1095-C)—Not required for filing.

If you have a refund would you like it to be Direct Deposited?

 Yes No

If you have a balance due would you like it auto debited?

 Yes No