2022 Tax Data Sheet

Erik's Tax Service

Spouse:

N80W26020 Plainview Rd Hartland, WI 53029 414-899-8250 erik@erikstax.com

GENERAL									
			Birth Date	Socia	I Security #	Occupation			
Yourself									
Spouse									
Same as last year	E-MA	AIL ADDRESS							
Address			County		Phone	: AM			
City			School Dis	trict		PM			
Zip			City	City Township Village					
Dependents Same as la	ast year M/F	Birth Date	Social Se	curity #	Does Depe	_			
				-		1 Single			
						2 Married			
		/			Yes N	No 3 Separated			
		/			Yes N	No 4 Head of Househ			
		/			Yes N	No 5 Widowed			
						3 Widowed			
YOU MUST COMPLETE	, AND SIGN,	THE FOLLOWING	SECTIONS						
Drivers License – You must p	provide a copy	of your Drivers Licer	se or State Issu	ed I.D.					
I do not have a Drivers L		•							
			Card						
I refuse to provide my D	rivers License	or State issued I.D. (Jaru.						
Amount of taxable pure	chases mad	e out of state or	online, on w	hich no	sales tax w	as paid. \$			
If anyone in your ho you must bring in yo			through the	e Marke	etplace, (a	ka Obamacare),			
FOR DIRECT DEPOSIT	CHEC	KING	SAVINGS	ROUTIN	IG NO				
NAME OF BANK	_	_							
The data I have entered in this proper substantiation of all ite									
			Sign: Taxpayer						

BRING IN ALL W-2 AND 1099 FORMS. If yo	ensions, in A nonovers, Anniony, or	ate Tax Refund, Tax E	xempt Income, Misc.
	ou are unsure or don't have enoug	h room to list them,	just bring in the forms.
Please	indicate (H) Husband, (W) Wife, (J) Joint.	
		urce	Amount
() \$		() \$
() \$		() \$
() \$		() \$
() \$		() \$
() \$		() \$
() \$		() \$
() \$		() \$
() \$		() \$
() \$		•) \$
() \$		() \$
() \$		() \$
		(
		(•
		\$(H	
() \$	Social Security	\$(H	l) \$(W) ır 1099 - Social Security)
MISCELLANEOUS ADJUSTMENTS	IRA	ROTH REGU	LAR SEP
Interest Penalty Due to Early Saving Withdrawal	\$	Husba	and Wife
Alimony Paid	\$ Contribu	ıtion \$	\$
Recipient's Name		2 Balance \$	\$
Recipient's Social Security Number	Please pro IRA account	vide Institution name and 1 nt you own ONLY if you with	2/31/22 Balance for each ndrew any funds from your IRA.
. 100.p.c. 11 0 000idi 000dility Hulliboi	m cupplies & books? \$		
	om supplies & books:		
TEACHERS: How much did you pay for classroo	1098-T FORMS. WE NEED DAT	A FOR EACH STU	
TEACHERS: How much did you pay for classroo EDUCATION CREDITS - WE NEED ALL 1 Student Year (Free	esh., Soph., etc.)	Full Time Part	Time WI
TEACHERS: How much did you pay for classroo EDUCATION CREDITS - WE NEED ALL 1 Student Year (Free School Tuition is considered	esh., Soph., etc.) Books	Full Time Part	Time WI
TEACHERS: How much did you pay for classroo EDUCATION CREDITS - WE NEED ALL 1 Student Year (Free School Tuition = 1	esh., Soph., etc.) Books	Full Time Part	Time WI
TEACHERS: How much did you pay for classroo EDUCATION CREDITS - WE NEED ALL 1 Student Year (Free School Tuition is school 52	esh., Soph., etc.) Books 9 Plan Funds Spent \$	FA FOR EACH STU Full Time Part /Class Supplies \$ Education IRA Sp	Time WI
TEACHERS: How much did you pay for classrood EDUCATION CREDITS - WE NEED ALL 1 Student Year (Free School Tuition = 52 Scholarships Received \$ 52 Did you pay back any education loans during	esh., Soph., etc.) Books 9 Plan Funds Spent \$ 2022? Yes No STUDE	Full Time Part /Class Supplies \$ Education IRA Sp	Time WI Dent \$ PAID? \$
TEACHERS: How much did you pay for classrood EDUCATION CREDITS - WE NEED ALL 1 Student Year (Free School Tuition = 52 Schoolarships Received \$ 52 Did you pay back any education loans during	Books Plan Funds Spent \$ 2022? Yes No STUDE	Full Time Part /Class Supplies \$ Education IRA Sp NT LOAN INTEREST ute to an EdVest acco	Time WI pent \$ PAID? \$
EDUCATION CREDITS - WE NEED ALL 1 Student Year (Free School Tuition = Scholarships Received \$ 52 Did you pay back any education loans during Did you contribute to an Education IRA? \$ CONTRIBUTIONS TO AN EDUCATION IRAMOUNT FOR EACH BENEFICIARY.	Books Plan Funds Spent \$ 2022? Yes No STUDE	Full Time Part /Class Supplies \$ Education IRA Sp NT LOAN INTEREST ute to an EdVest acco	Time WI pent \$ PAID? \$
EDUCATION CREDITS - WE NEED ALL 1 Student Year (Free School Tuition = Scholarships Received \$ 52 Did you pay back any education loans during Did you contribute to an Education IRA? \$ CONTRIBUTIONS TO AN EDUCATION IR AMOUNT FOR EACH BENEFICIARY. CHILD CARE EXPENSES BOX 10 W-2	Books 9 Plan Funds Spent \$ Did you contrib A OR TO AN EDVEST ACCOU	Full Time Part /Class Supplies \$ Education IRA Sp NT LOAN INTEREST ute to an EdVest acco	Time WI Dent \$ PAID? \$ unt? \$ AME, SSN, AND DOLLA
EDUCATION CREDITS - WE NEED ALL 1 Student Year (Free School Tuition = Scholarships Received \$ 52 Did you pay back any education loans during Did you contribute to an Education IRA? \$ CONTRIBUTIONS TO AN EDUCATION IR AMOUNT FOR EACH BENEFICIARY. CHILD CARE EXPENSES BOX 10 W-2 Care Expenses \$	Books 9 Plan Funds Spent \$ Did you contrib A OR TO AN EDVEST ACCOU	Full Time Part /Class Supplies \$ Education IRA Sp NT LOAN INTEREST ute to an EdVest account - WE NEED NA	Time WI pent \$ PAID? \$ unt? \$ AME, SSN, AND DOLLA
EDUCATION CREDITS - WE NEED ALL 1 Student Year (Free School Tuition = Scholarships Received \$ 52 Did you pay back any education loans during Did you contribute to an Education IRA? \$ CONTRIBUTIONS TO AN EDUCATION IR AMOUNT FOR EACH BENEFICIARY. CHILD CARE EXPENSES BOX 10 W-2 Care Expenses \$	Books Plan Funds Spent \$ Did you contrib A OR TO AN EDVEST ACCOU	Full Time Part /Class Supplies \$ Education IRA Sp NT LOAN INTEREST ute to an EdVest account - WE NEED NA \$ e	Time WI pent \$ PAID? \$ punt? \$ AME, SSN, AND DOLLA
TEACHERS: How much did you pay for classrood EDUCATION CREDITS - WE NEED ALL 1 Student	Books 9 Plan Funds Spent \$ Did you contrib A OR TO AN EDVEST ACCOU Care Expenses Provider's Nam Addres	Full Time Part /Class Supplies \$ Education IRA Sp NT LOAN INTEREST ute to an EdVest acco NT - WE NEED NA \$ e e e ess	Time WI pent \$ PAID? \$ punt? \$ AME, SSN, AND DOLLA
EDUCATION CREDITS - WE NEED ALL 1 Student Year (Free School Tuition = Scholarships Received \$ 52 Did you pay back any education loans during Did you contribute to an Education IRA? \$ CONTRIBUTIONS TO AN EDUCATION IR AMOUNT FOR EACH BENEFICIARY. CHILD CARE EXPENSES BOX 10 W-2 Care Expenses \$ Provider's Name	Books Plan Funds Spent \$ Did you contrib A OR TO AN EDVEST ACCOU Care Expenses Provider's Nam Addres Provider's I.D.#	Full Time Part /Class Supplies \$ Education IRA Sp NT LOAN INTEREST ute to an EdVest acco NT - WE NEED NA \$ ee ess	Time WI pent \$ PAID? \$ unt? \$ AME, SSN, AND DOLLA

MEDICAL	HEALTH INSURANC	E PREMIUMS M	AY BE D	EDUCTIBLE I	EVEN IF YOU D	ON'T ITEMIZE	
Medicare Premiums	\$			LONG TERM O	CARE PREMIUM	\$ (H)	\$(W)
Other Health Premiu	ums \$						
Did your employer	pay ANY portion of	our insurance?	Yes	No	Dentist		
Is your share of hea	alth insurance paid p	re-tax?	Yes	No	Doctor(s)	;	
Prescriptions	\$						
Hospital	\$						
Clinic	\$						
Medical Mileage				_ Hearing Aid	ds \$	Dentures \$	
TAXES	Property owners w	ho claim Homest	ead Cred	lit should sub	mit a copy of tl	heir 2022 Real Es	tate Bill.
Real Estate Tax on			_	Estin	nated Tax Payr		04-4-
Show "Net General Ta	ax"			Drior	Yr Apply \$	Federal	State _ \$
Other Personal Rea	al Estate Taxes \$				Yr Apply \$ TR-APR 22 \$		- \$ - \$
			_				_ \$ _ \$
Personal Property (Mobile Home, Etc.			_		TR-JUNE 22 \$		_ \$ _ \$
Additional State Ta	×				TR-SEPT 22 \$		
Paid for Prior Ye			_		TR-DEC \$ n 2022)		\$
					TR-JAN \$		\$
INTEREST					·		
INTEREST	First Mortgage, See	cond Mortgage, I	lome Eq	uity Loans	В	ring in 1098 Forn	1S
	Lende		ount			Lender	Amount
First Mortgage		\$		Second M	lortgage		\$
Second Mortgage		\$		Investmer	nt Loans (F.4952	2)	\$
Purpose of Home E	Equity						
	If mortgage interes	t is paid to an in	dividual,	, list their na	me and addre	ss, and I.D. num	ber.
CONTRIBUTIO	NS Money or Pro	perty to non-pro	fit organi	izations	Please indicate	(M) Money (P) P	roperty
WARNING: R	eceipts needed	for ALL cont	ributio	ns, Appra	isals neede	d for single i	tems over \$500.
Organizatio	n Type	Amo	unt	0	rganization	Туре	Amount
	(M/P)	\$				(M/P)	_ \$
	(M/P)	\$				(M/P)	_ \$
						(M/P)	Φ.
	(M/P)	\$					_ \$
	(M/P)					(M/P)	
	(M/P)			_	it mileage # _	(M/P)	
	(M/P)	\$		_		(M/P)	\$
RENT PAID ON I	(M/P)	\$\$ \$		non-prof	it mileage # _	(M/P) miles	\$
RENT PAID ON I	(M/P)(M/P) RESIDENCE Homestead Credit s	\$\$ \$	name, a	non-prof	it mileage # _	miles social security no	\$