MOMENTUM
TAX & FINANCIAL

2022 Individual Tax Organizer

	Legal Name (first & Last)	Occupation
Taxpayer		
Spouse		

Legal Address____

City, State, Zip Code____

	Telephone #	Email	Full-time Student	Permanently Disabled	Legally Blind	Dependent of another taxpayer
Taxpayer			☐	☐	☐	☐
Spouse			☐	☐	☐	☐

Dependents

	Name	Age (12/31/2022)	Did you provide at least 50% of their financial support? Select for "yes."	Full-time Student	Permanently Disabled
1				☐	☐
2				☐	☐
3				☐	☐
4				☐	☐

Please answer the following questions necessary to prepare your tax returns:

☐Yes ☐No	You will receive electronic copies of all returns prepared. Do you also want a paper copy of your returns mailed to you? This will incur a $25 charge for processing and postage
☐Yes ☐No	If you and/or your spouse received Identity Theft PIN(s) from the IRS, provide them here. These are mailed out in January and must be reported to file tax returns electronically.
☐Yes ☐No	If your driver's license expired since you last provided it, please provide the current copy.
☐Yes ☐No	If you and/or your spouse received Identity Theft PIN(s) from the IRS, provide them here. These are mailed out in January and must be reported to file tax returns electronically.
☐Yes ☐No	Did your marital status change before December 31st of the tax year? If so, when?___________________
☐Yes ☐No	Were there any changes in dependents in 2022? If so, provide the date of birth and SSN for each new dependent.
☐Yes ☐No	Did you receive fund for products or services through peer-to-peer apps such as PayPal, CashApp, Venmo or anything similar? If so, you may receive Form 1099-K, which will need to be reported on your tax returns.
☐Yes ☐No	Did you start a new business during the year?
☐Yes ☐No	Did you buy or sell stocks, bonds, mutual funds or other investments?
☐Yes ☐No	Did you have any new sources of retirement or investment income in 2022?
☐Yes ☐No	Did you purchase, sell or refinance your primary or secondary home in 2022?
☐Yes ☐No	Did you purchase or sell rental property during the year?
☐Yes ☐No	Did you have an interest in or signature or other authority over a financial account in a *foreign country*, such as a bankaccount, securities account, retirement account, or other financial account? _
☐Yes ☐No	Do you have a child under the age of 18 as of December 31, 2022 who has unearned income (interest, dividends, etc.) of more than $2,900?_
☐Yes ☐No	Did you make any gifts to any one person in excess of $16,000 during the year?
☐Yes ☐No	Did you donate cash or goods to a tax-exempt entity? If so, please provide documentation.
☐Yes ☐No	At any time during 2022, did you receive, sell, exchange or otherwise acquire any financial interest in any virtual currency?
☐Yes ☐No	Did you receive Premium Tax Credits toward your monthly health insurance premiums or purchase health insurance directly from the Marketplace? If so, please provide Form 1095-A.
☐Yes ☐No	Did you make any payments toward your 2022 FEDERAL taxes? If so, please provide dates and amounts for all payments.
☐Yes ☐No	Did you make any payments toward your 2022 STATE taxes? If so, please provide dates and amounts for all payments.
☐Yes ☐No	For direct deposit/payment, provide Bank Name ___________________ Account Type _______________ Routing Number __________________________ Account Number ________________________________
	For direct payment of taxes due, select a date for the withdrawal. This will be confirmed with you before filing.

Please provide the following tax documents needed to prepare your return, as applicable:

- ☐ Please attach W2 from all employers
- ☐ Please attach 1099-DIV from your financial institutions reporting dividend income
- ☐ If you purchased, sold or exchanged virtual currency in 2021, provide date and price for all acquisitions, exchanges and sales.
- ☐ Please attach Form SSA-1099 reporting Social Security Administration distributions
- ☐ Please attach Form 1099-G reporting a state refund from the government
- ☐ Please attach 1099-NEC reporting non-employee compensation sources
- ☐ Please provide income and expenses for your business(es), using the Schedule C template on the Client Resources page on our website
- ☐ Please provide your farm income and expenses
- ☐ Please attach Form 1098-E reporting student loan interest paid
- ☐ Please attach all charitable contribution statements
- ☐ Please attach Form 1098-T reporting tuition payments
- ☐ If you paid Long-Term Care insurance premiums, attach the annual statement showing policy period and amount paid (Colorado-specific for taxpayers with income under $50,000-single, $100,000-joint)
- ☐ If you received a notice from the IRS or a state agency, attach all pages of the notice.
- ☐ Please attach 1099-INT from your financial institutions reporting interest income
- ☐ Please provide consolidated 1099 or 1099-B reporting broker or barter transactions
- ☐ Please attach 1099-R reporting pension or retirement distributions
- ☐ Please attach Form 1099-G reporting unemployment compensation from the government
- ☐ Please attach 1099-MISC reporting other income sources
- ☐ Please attach Form 1099-Q reporting college savings account distributions
- ☐ Please provide your rental income and expenses using the Rental Income & Expenses template on the Client Resources page of our website
- ☐ Please attach K1 from any pass-through entities (unless prepared by Momentum)
- ☐ Please provide Form 1098 reporting mortgage interest paid, if applicable. If you refinanced or your loan was sold in 2021, you will have more than one form.
- ☐ Please attach Form 1099-SA reporting health/medical savings distribution
- ☐ Please attach 1095-A, B or C regarding health insurance coverage.
- ☐ If you installed energy efficient exterior windows or doors, or purchased an electric vehicle, attach documentation of costs and installation date.