



TAX ORGANIZER

Taxable Year : 2022

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Marital Status at end of Tax Year

Married - filing jointly
Married - filing seperately

Head-of-Household with Qualifying Dependent
Single
Widow(er) - Date of Spouses Death _____

(T) - Taxpayer (S) - Spouse

Your Name		D.O.B.		SSN	
Spouse's Name		D.O.B.		SSN	
Address					
Address					
City		State		ZIP	
Primary Phone #			Primary Email Address		
Occupation(T)			Occupation(S)		

DEPENDENTS

First and Last Name	SSN	Relationship	Date of Birth

Did you move during the year 2022 ? : If so include closing statements for bought/sold home

Moved from - Old Address: _____ Date moved _____

Moved to - New Address: _____ Date moved _____

2022 Estimates	Federal Amount Paid	State Amount Paid	Local Amount Paid
2021 Overpayment			
April 15, 2022			
June 15, 2022			
Sept. 15, 2022			
Jan. 15, 2023			

Do you have any financial interest in, or authority over foreign account or trust?

Yes No

At any time in 2022, did the taxpayer(s) receive (as a reward, award or payment) or sell, exchange, gift or dispose of a digital asset (or any financial interest in a digital asset)?

Yes No

** If yes, include documentation / records.

If you are eligible for a federal tax refund, do you want the IRS to directly deposit your refund into your bank account?

**** PLEASE PROVIDE A COPY OF A CANCELED CHECK TO VERIFY THIS INFORMATION**

BANK NAME : _____
Account Number : _____

Account Type :

 Checking
 Savings

Dear Client,

As the year winds down, the tax reporting forms begin to arrive, and we want to remind you which ones we need you to accumulate and send to us with your tax information. First, there is a **new form, the 1099-K** that many of you will receive this year for things like Ebay or Facebook Marketplace sales, and sometimes for simple cash transfers using a cash between friends app such as Zelle.

If you receive a 1099-K this year please make sure to provide it to us, and be prepared for a phone call and some questions from us so that we can report it properly to minimize income tax or determine the tax does not apply.

We still need the annual information forms that are sent to you for tax purposes. As a reminder, here is a simple checklist:

- W-2 for wages
- 1099-DIV for dividends
- 1099-NEC for income
- 1099-R for retirement
- 1099-Int for mortgages
- K-1 forms for investments in S corporations or partnerships
- Form 5498 for IRA values
- Child care costs (Name, address, amount and ID # of the recipient)
- Charitable donations – total amounts and recipients
- Property tax paid on your home, property or cars
- Estimated tax payments and dates
- Any letters you received from the IRS, state or local authorities
- Our engagement letter
- W-2G for gambling
- 1099-B Brokerage
- 1099-MISC for income
- 1099-G for refund & unemployment
- 1098-T for tuition
- 1099-Int for interest
- SSA-1099 Social Security
- 1099-K for income
- 1099-SA for HSA's
- IRA and Roth IRA contributions for 2022

If you have a small business, farm or rental property you can find a checklist for those activities, if needed, at www.elheope.com under the TAX tab.

Again, **IRS scrutiny of foreign accounts** means that you need to be absolutely clear about any non-US accounts or income so that we report it correctly.

If you have bought and/or sold a home in 2022 we need the closing statements on both the purchase and the sale, as well as a list of improvements (with cost) for any improvements you made to the old home.

Cryptocurrency activities continue to cause major tax issues for people that believe it is not reportable. Bluntly, **cryptocurrency is taxable**, is reportable, and carries incredible penalties for not reporting, so make sure to discuss it with us if you dipped your toes in that water.

Every year we are reminded of how much we value your business, and we want to once again say thank you. Please contact us with any questions.

Sincerely,

Ellis Lee Hostetter & Co., P.C.