2022 Itemized Deductions

2022 Medical Expenses

Medicare Premium	
Medical Insurance	
Long Term Care Insurance	
Doctors	
Dentists	
Orthodontic & Dentures	
Eye Glasses & Contacts	
Hearing Aids & Batteries	
Chiropractors	
Hospitals	
Prescriptions	
Ambulances	
Lab Fees & X-Rays	
Travel Expenses	
Other	
Reimbursements for Above	
Number of Medical Miles	

2022 Taxes Paid

Prior Year State Taxes Paid	
Real Estate Taxes—Residential	
Personal Property Taxes	
Other Taxes Paid	

2022 Interest Paid

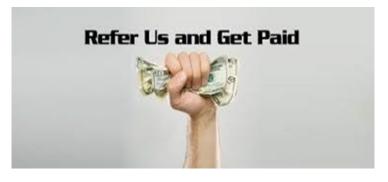
Mortgage Interest Paid	
Mortgage Insurance Paid	
Points Paid	
Investment Interest Paid	

2022 Charitable Contributions—Cash

Churches	
Other Charities	
Non-Cash New Items (Food, Etc)	
Other	
Charitable Mileage	

2022 Miscellaneous

Educator Classroom Expenses	
Impairment Related Work Expenses	
Gambling Losses	
Other	



2022 Estimated Payments Made

Estimated Payments		1st Payment		2nd Payment		3rd Payment		4th Payment	
	2021 Refund Applied to 2022	Date Paid	Amount	Date Paid	Amount	Date Paid	Amount	Date Paid	Amount
Federal									
State									
Other									

Questions for My Preparer

2022 Tax Document Checklist (Check Documents You Have)

New Clients	1099Rs for all retirement distributions
Social Security cards for everyone on return	1099 for all Social Security payments
Dates of birth for everyone on the return	1099 for Railroad Retirement payments
Copy of 2021 tax return	1099 G for unemployment received
All Clients	W2G for gambling winnings
W2s for all taxpayers	Records of gambling losses
1099 INT for interest paid	Records of Rental Income and Expenses
1099 DIV for all dividends paid	Records of Business Income and Expense
Consolidated Brokerage Statements	Records of Farm Income and Expense
Virtual Currency Statements	Records of Alimony Paid or Received
All forms K1	Records of Teachers out-of-pocket expenses
All 1099 NEC, 1099 MISC, and 1099Ks	Records of Retirement Acct Contributions
Records of any other income	1098Ts and Other Educational Expenses
Amounts of State/Local Taxes paid in 2022	1095A for Obamacare Premiums
Student Loan Interest paid	Mortgage Interest 1098s
Records of Daycare Expenses	Records of all estimated payments
Real Estate Settlement Stmnts (new or refi)	Records of all 529 plan contributions
Records of Missouri Credits	Direct Deposit Information

How to Use This Form

Highlight all items that apply to you. Use the margins to write in the number of items expected. For instance, if you and your spouse held 3 jobs between you, then next to the W2 line write 3. Once all forms of that type are received, check the box. When all of the highlighted boxes are checked, you're ready for your tax appointment.

Use the reverse side to tally your itemizable expenses, even if you can't itemize. There are certain state deductions where they may matter.

Help Us Help You

We want to ensure you pay the least tax—receive the largest refund possible. Here are a few tips to keep in mind to prepare for your tax interview.

Make a list of any questions ahead of time so you don't forget to ask.

Please don't highlight your tax documents—highlighter does not scan well and often blackens the amount highlighted.

If there's something you think we should know, tell us. We aren't mind readers and we might forget to ask, but we do want to assist you.