

2022 1040 US Miscellaneous Questions

If any of the following items pertain to you or your spouse for 2022, please check the appropriate box and provide additional information if necessary.

- | Yes | No | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Is your address/email/phone the same as previous year? If different put your new information on the back. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did your marital status change during the year? If so, please explain. |
| <input type="checkbox"/> | <input type="checkbox"/> | Were there any changes in dependents? If so, please explain. |
| <input type="checkbox"/> | <input type="checkbox"/> | For direct deposit purposes, is your banking information the same as previous years? If not, please provide new information. (Bank Name, Routing Number, and Account Number) |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make any cash charitable contributions that you have receipts for? (cash, check, credit card, etc.) If yes, please provide the total amount. _____ |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make any noncash charitable contributions? If yes, please provide the amount. _____ If the total amount is over \$500 please include a description, the date of the donation, and the value of the donation. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you buy anything online or out of state that you did not pay sales tax on? If yes, please provide the total amount of all purchases. _____ |
| <input type="checkbox"/> | <input type="checkbox"/> | At any time during 2022, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? If so, we will need sales and cost information. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school? If so, please provide 1098-T. If there were funds used from an education savings account please include the 1099-Q. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you pay any student loan interest? If so, please provide 1098-E. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make any Edvest contributions? If so, please provide how much and to whom you made the contribution. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did any of your dependents attend private school in WI for grades K-12? If so, please provide the name, grade, and amount of tuition for the dependent along with the name, address, and Employee Identification Number (EIN) of the school. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you pay any rent? If so, please list total rent paid for the year and if it included heat or not? _____ |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you pay out of pocket for any health, dental or vision insurance (not including any health insurance through your employer that is pre-taxed)? If so, provide the total amount paid for the year. _____ For insurance paid through the government marketplace please include Form 1095-A. |