Progressive Tax Service - Tax Year 2022 1803 Smizer Station Road, Fenton, MO 63026 (636) 225-3708

Note: items in gray that have not changed since last year do not need to be completed.

You	ır Name	e:					SSN	(yours)				
Spo	ouse Na	ame:					SSN	(spouse)				
Str	eet Add	dress						of Birth (yo	ours)			
City, State & ZIP								Date of Birth (spouse)				
Primary Telephone							With	Within St. Louis City Limits?			N	
Tax	payer's	s Email	Address									
Spo	ouse's E	mail A	ddress							_		
Tax	payer's	s Driver	's License #				State:	Issue	date:	Exp date:		
Spo	ouse's D	Driver's	License #				State:	Issue	date:	Exp date:		
Ha	ve you ı	receive	d any notice from th	ne IRS	or state rev	enue departm	ent in 2022?	Y N				
Ma	rital Sta	atus at	12/31/2022		Single	Married	d 🔲 Se _l	parated	☐ Widow(er)			
Dic	you di	vorce o	r separate during 20	022?	Y N							
Cai	n you be	e claim	ed as a depent by ar	nother	taxpayer, s	such as a parer	nt? Y N					
De	penden	nts: Do	not list yourself or y	our sp	oouse. List d	ependent child	dren or other d	ependents:	Months lived in			
Na	me:			Birth	Date:	SSN:	Relations	ship:	home 2022	College	student	
										Υ	N	
										Υ	N	
			Idren have unearned							Υ	N	
	you an	ticipate	e a different taxpaye	ty? ` er will s	Y N seek to clair	m a child listed	l above as their	dependent	for tax year 2022?	Y N		
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	Υ	N	Did you make any contributions to a §529 plan in 2022?							
Home	Υ	N	Did you purchase or sell a home during the year? If yes, additional information including closing stmts are needed.							
	Υ	N	If you sold a home, did you claim the First-Time Homebuyer Credit when purchased? If yes, provide details.							
	Υ	N	Did you refinance a mortgage or take a home equity loan? If yes, please provide closing statement.							
	Υ	N	Did you use mortgage loan proceeds for purposes other than to buy, build or substantially improve the home?							
	Υ	N	Did you make any new energy-efficient improvements to your home? If yes, provide details.							
	Υ	N	Do you own a business or an interest in a partnership, corporation, LLC, farming activity or other venture?							
ess			Please call our office if you need a self employed income worksheet.							
Business	Υ	N	Did you receive income from a sharing/gig economy activity such as AirBnB, Uber or Shipt?							
Bu	Υ	N	Did you have income from rental property, farm, self employed business, gambling, legal settlements, disability,							
			or any other income? Please provide details (our office may have worksheet available for some income types).							
	Υ	N	Did you, or will you, contribute any money to an IRA for 2022?							
			Taxpayer Amount: Traditional \$ Roth IRA \$							
Investments			Spouse Amount: Traditional \$ Roth IRA \$							
	Υ	N	Did you rollover any amounts from a retirement account in 2022?							
me	Υ	N	Did you sell or transfer any stock or sell rental or investment property in 2022?							
est	Υ	N	Did you receive any income from an installment sale?							
lu^	Υ	N	Did you have any investments that became worthless in 2022?							
	Υ	N								
			assets (crypto-currency, non-fungible tokens or stablecoins)?							
	Υ	N	Were you granted, or did you exercise, any employee stock options during 2022?							
	Υ	N	Did you/will you make a contribution to an HSA for 2022 (due by 4/18/22) or distributions from an HSA?							
Other	Υ	N	Did you pay any interest on a loan for a boat or RV that has full living quarters? If yes, provide details.							
£	Υ	N	Did you make any charitable contributions in 2022? If so please provide details.							
	Υ	N	Did you pay sales taxes on a major purchase in 2022, such as a vehicle, boat or RV?							
[(pe	ensions ome re	W-2 (wages), 1099-INT (interest), 1099-DIV (dividends), 1099-B (proceeds from broker transactions), 1099-R and IRS distributions), Schedules K-1 from partnerships, S Corporations, estates and trusts) and other porting statements, including all copies provided from the payer. 5-A, B or C (for health insurance purchased either in or outside a public exchange or employer provided.							
]]] [If you Cop Mile Inco	ou are a pies of c eage fig ome an tails of c mpleted anizer, ease no r engag	a new client, provide copies of last year's tax returns. closing statements if you bought or sold real estate. gures for any automobile expenses claimed, including total, commuting and business mileage. Id deductions categorized (worksheets available) for business or rental activities split between Jan - June & July - Dec. estimated tax payments made, if any. Id Individual Income Tax Organizer/aka Interview Sheet. Please note, if you choose not to complete the all taxpayers must at least answer the yes/no questions under the heading "Questions for All Taxpayers." ote, before your completed returns can be delivered and/or electronically filed, we must have Form 8879 and gement letter signed. If married filing jointly, both spouses must sign. If one spouse is unable to come to our sign, please discuss options with your preparer or one of our staff members.							
[If you Cop Mill Income Det Cor org Ple our offi	ou are coies of coies	a new client, provide copies of last year's tax returns. closing statements if you bought or sold real estate. gures for any automobile expenses claimed, including total, commuting and business mileage. Id deductions categorized (worksheets available) for business or rental activities split between Jan - June & July - Dec. estimated tax payments made, if any. Id Individual Income Tax Organizer/aka Interview Sheet. Please note, if you choose not to complete the all taxpayers must at least answer the yes/no questions under the heading "Questions for All Taxpayers." ote, before your completed returns can be delivered and/or electronically filed, we must have Form 8879 and gement letter signed. If married filing jointly, both spouses must sign. If one spouse is unable to come to our							
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