2022 TAX WORKSHEET (Page 2)

ITEMIZED DEDUCTIONS:

Most taxpayers will opt for the increased standard deduction; Joint returns $25,900/Single $12,950/HOH $19,400

Medical Expenses: (include premiums for health care, co-pays, prescriptions and doctor and hospital visits. Must exceed 7.5% AGI)	$
Medical Mileage: Total Miles	
Mortgage Interest: (Include Form 1098 from Bank) Main Home	$
Other Non-Rental	$
Property Taxes: (Form 1098 will have escrow) Main Home	$
Other Non-Rental	$
Charitable Contributions: Cash	$
Charitable Mileage: _____ @ .14 cents per mile Prop	$

If property contribution exceeds $500, IRS requires additional information.

Please provide: Contribution type (clothing, household goods etc.):

Org Name:

Org Address:

Date of contribution:

College Tuition Credit: (*Must* include Form 1098-T from College)

Student:

School:

Year of College: 1 2 3 4 Grad

Books/Supplies: $

Student:

School:

Year of College: 1 2 3 4 Grad

Books/Supplies $

NYS Volunteer Firefighter Credit:

Who Qualifies?

Taxpayer ☐

Spouse ☐

Active volunteer firefighter or volunteer ambulance worker for all of the tax year.

Fire Company:

Name:

Address:

Affordable Care Act: 1095-A

If you or a family member were enrolled in the health insurance marketplace (Obamacare) for any part of 2022, you must supply the **1095-A** received in January from the provider. Your account will have to be reconciled to determine if any advance premium tax credits received were calculated correctly.

Rental Property:

For more detail, please enclose Rental Worksheet available at www.eptax.com

Property Address:

2022 purchase/Include Closing Statement

Rent Received:	$
Advertising:	$
Insurance:	$
Legal/Prof	$
Mortgage Interest	$
Repairs (minor)	$
Supplies:	$
Prop Taxes	$
Utilities:	$

List all Capital Improvements (roof, remodel, water tank, furnace etc) on an attachment with type of improvement, date of improvement, and cost.

Unlike the IRS, NY State will still allow unreimbursed business deductions (union dues, uniforms, tax prep fees, investment and safe deposit fees which exceed 2% of Adjusted Gross Income. However most taxpayers will still do better with the standard deduction. If your itemized deductions will exceed $16,050-Married joint, $8,000-Single, or $11,200-Head of Household, please enter the deductions below or include on a separate attachment. Also, please provide **type** and **cost** of any Residential Energy items purchased in 2022 that meet Energy Star requirements, such as Furnace/AC/Hot Water Tank/ Insulation/Windows/Doors (no appliances). For further info: https://www.irs.gov/newsroom/irs-releases-frequently-asked-questions-about-energy-efficient-home-improvements-and-residential-clean-energy-property-credits