James Ridout CPA
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January 1, 2023

Dear Client,

We look forward to servicing your tax returns this year. This is the 2022 Tax Organizer for your convenience. The 2022 Tax Organizer is a guide for you to use as you gather materials for preparation of your 2022 tax returns. We ask that you use it to notate any changes in your situation from the previous year, such as if you moved in 2022, we would need your new address. For areas that are the same as previous years, you may leave those areas blank. For general changes, please utilize the check boxes. For returning clients, please update the information sheet with changes from the previous year (page 2). Feel free to make notes in the indicated section.

***Must be Filled Out (Please Check Box If Applicable)**

☐ **The IRS has mailed me a IP PIN in the Last 3 years.**

☐ **I had Obama Care for 2022. (Will Need 1095-A from Healthcare.gov)**

☐ I began a new business in 2022. Date Started ____/_____/_____

☐ I ceased operations of a business in 2022. Date Closed ____/_____/_____

☐ I made estimated tax payments for 2022. $___________ total.

☐ I want $3 to go to the presidential campaign (does not change refund/amount due)

☐ I moved this year. Date Moved ____/_____/_____

☐ I am claiming _______ dependent(s) 2022.

☐ I have more than $10,000 in a foreign bank account. Total $__________________

Bank Name_______________________ Acct. #____________________________

Address: ____

Other Notes:

Thank you,

James Ridout

*Check All Applicable For 2022

☐ I Own A Home

  ☐ I Made Mortgage Interest Payments (1098 Needed)

  ☐ I Made Real Estate Tax Payments

☐ I Sold/Bought A Home

  - (If a home was sold in 2022, we will need a Settlement Statement (HUD-1) from the Purchase and a Settlement Statement from the sale of the home. If a home was bought, we will need Settlement Statement (HUD-1) from the purchase of the home. You can contact the Title Company to get copies if you do not have them.)

☐ I Received Rental Income From My Primary Residence

☐ I Received Rental Income From An Investment Property

☐ I Had Obama Care

☐ I Had Employer Health Insurance

☐ I Got Married, Divorced, Or Became a Widow(er). Date: ____ / ____ /____

☐ I Have A Business (Fill Out Page 4)

☐ I Received Unemployment Benefits

☐ I Received Social Security

☐ I Received W-2s

☐ I Received 1099s

☐ I Had Investment Income

☐ I Made Donations. $____________________

☐ I Made IRA Contributions: ☐Roth (or) ☐Traditional $____________ Spouse: $____________

☐ I Received A Letter From the IRS

☐ I Made Estimated Tax Payments. Total $_______________

☐ Other: (Please)

  - ____

    ____

  - ____

    ____

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2022 Tax Organizer – Please update changes from previous year. Leave unchanged areas blank.

How Did You Hear About Us:

☐Yelp ☐Google ☐From a Friend ☐Other: ______________________

Client Information

Name:__________________________________ DOB: _____/____/____ SSN:________________

Street Address:____

City, State, Zip Code:____

Phone Number: ___________________ Email: ____

Driver's License #__________________________________ State: ____ Issued Date: ___ /___ /___

Expiration Date:___ /___ /___ Occupation:_______________________________________

Bank Information:

☐ Use Bank Info for Direct Deposit of Refund ☐ Use Bank Info for Direct Withdrawal of Taxes Owed

Bank Name: ______________ Acct#: ______________________ Routing#: ____________________

(Need Spouse's Information) ☐ Filing Jointly ☐ Filing Separately ☐ Became Widow(er)

Spouse's Name:________________________________DOB: ___ /___ /___ SSN:____________________

Phone Number: ___________________ Email: ____

Driver's License #__________________________________ State:____ Issued Date: ___ /___ /___

Expiration Date:___ /___ /___ Occupation:_______________________________________

Dependents: Y / N (If yes please fill out information below)

Name________________________________ Relationship: ________________________

DOB: ___ /___ /___ SSN: _________________

Name________________________________ Relationship: ________________________

DOB: ___ /___ /___ SSN: _________________

Business Income/Expense Worksheet

Type Of Business:

☐: Single Member LLC ☐: Partnership ☐: S-Corp ☐: C-Corp ☐:Non-Profit

☐: Trust / Estate

Name of Business:____

Address:____

Income: $______________ EIN:__________________________

Expenses:

Accounting	____________	Office Telephone	____________
Advertising	____________	Office Utilities	____________
Bank Charges	____________	Other Taxes	____________
Business Insurance	____________	Paid to Others	____________
Car & Truck	____________	Parking & Tolls	____________
Cell Phone	____________	Payroll Taxes	____________
Equipment Rental	____________	Postage & Delivery	____________
Dues & Subscription	____________	Printing	____________
Interest	____________	Sales Tax	____________
Internet	____________	Supplies	____________
Janitorial	____________	Travel	____________
Laundry & Cleaning	____________	Tools	____________
Legal & Professional	____________	Other: (i.e. Equipment Purchased)	
Licenses & Permits	____________	______________	____________
Meals	____________	______________	____________
Office Expense	____________	______________	____________
Office Rent	____________	______________	____________
Office Repairs	____________	______________	____________

Mileage For Business: __________ Personal: __________ Total Mileage: __________

Home Office: Square Ft for Home: _________ Square Feet for Home Office: ________

Total Utilities for Home Office: __________

Rental Property Income/Expense Worksheet (Fill out 1 for Each Property)

Property Address: ____

Name on Deed (If business use business Name): ________________________ ☐ LLC

Days Rented: _______ Property Type:__________ Air BnB: ☐ Yes ☐No

Income: $___________ Is the Lease for longer than 1 year: ☐ Yes ☐ No

Expenses:

Advertising	$______________	Utilities	$___________
Auto (Rentals)	$______________	Other Taxes	$___________
Association Fees	$______________	Other:	
Cleaning	$______________	________________	$_______
Commissions	$______________	________________	$_______
Insurance	$______________	________________	$_______
LLC Fees	$______________	________________	$_______
Legal Fees	$______________	________________	$_______
Management Fees	$______________	________________	$_______
Mortgage Interest	$______________	________________	$_______
Real Estate Taxes	$______________	________________	$_______
Small Repairs	$______________	________________	$_______
Supplies	$______________	________________	$_______
Travel	$______________	________________	$_______

Renovations In 2022 (List Each Renovation):

____

____

____

____

Mileage: For business ________ For Personal _________ Total _______

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Privacy Policy

Types of Non-Public Personal Information We Collect

James Ridout CPA collects non-public personal information about you that you provide to us, or by which is obtained by us with your authorization. Examples of sources from which we collect information include client phone calls, interviews, client emails and letters, client financial planning organizer, tax returns, and questionnaires concerning financial history.

Parties to Whom We Disclose Information

Current and former clients' non-public personal information obtained in the course of providing accounting services is not disclosed except as required or permitted by law. Permitted disclosures include providing client information to *James Ridout CPA* employees and, in limited circumstances, to unrelated third parties who require such information to assist James Ridout CPA in providing client services. The confidential nature of the shared information is emphasized in all circumstances.

Protecting the Security and Confidentiality of Current and Former Client Information

James Ridout CPA retains records relating to professional services provided to clients so that we may better assist clients with their professional needs. Additionally, records are retained in some circumstances to comply with professional guidelines and requirements. To protect your non-public personal information, *James Ridout CPA* maintains electronic, physical, and procedural safeguards in compliance with CPA professional standards.

Your privacy, our professional ethics requirements, and our ability to provide quality financial services are important to our firm. If you have any questions regarding James Ridout CPA's privacy policy, please contact us.

Calendar of Due Dates:

- January 15, 2023 - Deadline for estimated payments
- January 31, 2023 - 1099s and W-2s to contractors and employees
- February 1, 2023 – Due date for providers to send your tax forms (i.e. Mortgage Interest, W-2, Stock Accounts, etc.)
- March 15, 2023 – S-Corp 1120-S and/or Partnership 1065 filing/extension due
- April 18, 2023 – Personal 1040 and/or Trust / Estate 1041 Tax Return filing / extension due
  - 2022 contributions for IRA, RMDs and/or 401k due
- May 15, 2023 – Tax exempt 990 (Non-Profit Corporations) due
- June 15, 2023 – 1040-NR (Non-Resident aliens) including LLCs for Non-Resident due
- September 15, 2023 – S-Corp 1120 and Partnership 1065 with filed March extension due
- October 15, 2023 – Personal 1040 and Trust / Estate 1040 with filed April extension due
- November 15, 2023 – Tax exempt 990 with filed May extension due

1. **Will the tax filing deadline be extended like the last 2 years?**
   A. The IRS has not announced any extensions as of the date of this notice.
2. **How can I deliver my completed tax organizer and tax documents to you?**
   A. Send attachment to our email (info@jamesridoutcpa.com)
   B. Upload your documents to Dropbox. (Email or call us to set up a Dropbox if you do not already have one with us)
   C. Drop off your documents at our office Monday through Friday 10:00AM – 6:00PM.
   D. Schedule a consultation with James (In office, via telephone, or virtual call) by calling our office at 954-368-3817.
3. **How Long will it take you to process my tax return.**
   A. Once we have all your documents, you will secure your place in line in our queue. We operate on a first come first serve basis.