



SUSAN SILVERMAN QUIGLEY, CFP®
CERTIFIED FINANCIAL PLANNER

8 YALE STREET · GARDEN CITY, NEW YORK 11530
PHONE 516 354 3334 · FAX 516 320 6879 · EMAIL SUSAN@SQUIGLEYFINANCIAL.COM

Tax Organizer

ALL CLIENTS MUST RETURN THE QUESTIONNAIRE WITH THE BASICS FILLED IN UNLESS IT IS IN THE PORTAL

We have a secure portal to upload documents and a full questionnaire. We will send all a link to portal.

If you have a link, go to MYTAXDOCS.COM and please confirm last year's info.

1	Full Name	DOB	Social Security		
2	Spouse Name	DOB	Social Security		
3	Mailing Address (APT #, City, State, Zip Code)	Tax Portal ID (optional)		Portal Password (optional)	
4	Primary Email	Primary Phone Number			
5	Spouse Email	Spouse Phone Number			
6	What is the best method to reach you?	Email	Spouse Email	Cell	Spouse Cell
7	Did you have health insurance this year?	Yes	No	N/A	
If your family had health insurance, was it from the market place? If so, please upload a 1095A form to the Tax Portal.					
8	Did you move to or from a different state in 2022?	Yes	No		
9	If yes, what state did you move to or from?	In what month did you move?			
10	Bank Account Number	Bank Routing Number (ABA #)			
11	Driver's License ID #	State Issued *	Issue Date		
12	Expiration Date	Doc ID number (not the license #)			
13	Spouse Driver's License ID #	State Issued	Issue Date		
14	Expiration Date	Spouse License Doc ID Number			

If this is the first time we are preparing your taxes, please upload 2021 tax return to the tax portal (if married in 2022, please upload both returns)

**ALL DOCUMENTS MUST BE uploaded to the portal or dropped off personally.
No more emails due to cybersecurity reasons (my clients get hacked, not me).**



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IRA Contributions

NOT PAYROLL DEDUCTIONS TO 401K/403B

- 1 Did you or plan to contribute to your IRA for 2022 ? If so, enter \$ dollar amount
- 2 Did you or plan to add to your Roth for 2022? If yes, please enter \$ dollar amount

529 Plan Contributions

- 1 Did you contribute to a 529 plan? If so, how much did you contribute in total? Please enter \$ dollar amount
- 2 Please enter which state is assigned to the 529 plan

Miscellaneous Topics

- | | | | |
|---|--|-----|----|
| 1 | Were you or your spouse Non-resident Aliens for any part of the year? | Yes | No |
| 2 | Did you receive any notices from the IRS or NYS during the past 3 years? If yes, please upload notices to the portal | Yes | No |
| 3 | Did you sell any Real Estate in 2022? If yes, please upload any relevant docs to the portal & contact Susan | Yes | No |
| 4 | Do you have LTC Insurance? If yes, how much do you pay per person? | | |
| 5 | Did you pay or receive Alimony? If yes, when was your divorce finalized and how much did you pay or receive? | | |

COMPLETE ONLY IF YOU PAY QUARTERLY ESTIMATED PAYMENTS ON 1040ES & NY IT2105
 Do not include normal withholding from Paycheck (not for W2 workers)

ESTIMATED TAXES				
	1 ST Qtr April 2022	2 nd Qtr June 2022	3 rd Qtr Sept. 2022	4 th Qtr Jan. 2023
FEDERAL TAXES				
STATE TAXES				

Donate to Charities (only for NY)

NYS allows you to donate to charities when you file your return. These donations will get added to your tax bill or reduce your refund. Please fill in specific amount if you want me to include it when we file your return

1. Gift to Wildlife 2. Breast Cancer 3. 9/11 Memorial 4. Olympic Fund 5. Missing Children 6. Prostate Cancer 7. Teen Health
8. Veteran's Remembrance 9. Alzheimer's 10. Firefighters 11. Homeless Veterans 12. Autism 13. Mental Illness
14. Women's Cancer 15. Veteran's Homes 16. Love Your Library 17. Lupus 18. Military Family 19. CUNY 20. Life Pass It On
21. ALS Research 22. School-Based Health Centers 23. Food Banks 24. Gift to Arts 25. Meals for Seniors 26. Leukemia
27. NYS Finance 28. William B. Hoyt 29. Gun Violence 30. Substance Use

Charity Number:

Charity Amount \$:

Charity Number:

Charity Amount \$:



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Sources of Income

REMEMBER TO UPLOAD ANY OF THE FOLLOWING SOURCES OF INCOME

W2s	1099s & 1099k	Social Security	K1	Other	Unemployment (download 1099 from state website)
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Investment & Interest Dividends

1099 Dividend	1099 Interest	Sale of House	Capital Gains (please provide cost basis)
None of the above	Other		

Deductions and Expenses

Expenses are limited but still include mortgage interest, charity, medical (if over 7.5% of AGI).
Some investment related expenses such as advisor fees, margin interest, and tax prep fees
might be deductible off STATE

- 1 How much did you pay in mortgage interest? Please upload form to the Tax Portal!
- 2 How much in cash or check did you donate to charity? Please enter amount
- 3 Did you donate any physical goods? How much was the value? Under \$500 Over \$500

We just need dollar amounts UNLESS you donated \$250 or more to an organization.
PLEASE DO NOT SCAN SMALLER RECEIPTS.

Remember, miles for volunteer work are deductible if you are itemizing. Let us know!
Please upload all relevant forms to the TAX PORTAL!

****Please upload any receipts of your donations of more than \$500 to the Tax Portal****

- 4 Did you have out of pocket Medical Expenses totaling over 7.5% of your income? (common deductions include health insurance premiums, dental, therapy, drugs, and equipment not reimbursed by insurance.)

Yes	No	If yes, please fill in the amount
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Medical Miles & Travel Expenses

- 1 Please list below with \$ dollar amounts if you had Medical miles to get to and from the doctor, if you paid for transportation, parking, Uber.

WE DO NOT NEED FORMS FOR MEDICAL EXPENSES & CHARITIES, ONLY SPECIFIC AMOUNTS
PLEASE HELP US OUT BY PUTTING COMBINING DOCS INTO FEWER SCANS

Work Related Expenses

- 1 Did you have any non-reimbursed employee expenses?
This includes home office (IF REQUIRED BY YOUR EMPLOYER).
Non-reimbursed mileage, equipment, training, and misc. fees.
If so, please explain & write down \$ dollar amounts

MAY BE DEDUCTIBLE OFF STATE ONLY