## **PASADENA TAX SERVICES**

VERIFICATION OF TAX YEAR 2022 &/or \_\_\_\_\_ DATA PROVIDED

PLEASE SIGN THIS FORM AND RETURN IT WITH YOUR TAX DOCUMENTS

My Dear Friends,

As usual, please read this page, respond to the questions and sign it. **I will not prepare your return without it.**  Sorry, I apologize for the inconvenience. But the IRS requires confirmation of these issues. Mailing me your tax docs? Please be sure you BOTH sign this (if married). If you are coming in, please be sure to bring this with you, (signed by your mate, if coming in alone.) DO you live in a Federally declared Disaster Zone? We get an extra month- LA & Orange Co. CA

**This confirms that all the data entered here and into any organizer, including information on notes, attachments, additional worksheets and schedules, are true to the best of my (our) knowledge.**

IMPORTANT: At any time during 2022, did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency? YES\_\_\_\_ NO \_\_\_\_

***All* W-2’s and 1099s reflecting my income are reported.** They are correct and complete, except as noted. (If there are errors, please provide an explanation if the 1099s are wrong.) **Income from all sources**, domestic (USA) and worldwide, has been reported. All income received in cash or via barter or trades has been reported.

**PLEASE MARK \_\_\_\_Yes, or \_\_\_ No:** We employed household help in 2022. Household help = child or dependent care providers, tutors, housekeepers, gardeners, companions, etc. If they were paid at least $2,000 for the year, you **must** report the earnings and file the **W-2s and related payroll tax returns**. **(DEADLINE - With SSA JAN 31, 2023**

I/we have supporting records for ALL business expenses & auto mileages claimed. YES \_\_ NO\_\_\_

** Did you pay anyone $600** or more for services performed in the course of business? You must send THEM 1099s ASAP. **(DEADLINE - File with IRS by January 31st)** This includes attorneys, part-time help, landlords, rental property folks, commissions paid. Not sending them out will cost you the deduction for the expenses, if audited. (**Do you want us to prepare the 1099s? Almost or too late now but remember for NEXT DECEMBER (this) year.**

** Business Assets –** I have made purchases of business assets in excess of $1,000 and can provide receipts with my tax files.

** Earned Income Credit (EIC)** - if you are eligible for the EIC, you certify the following: The child(ren) in question is (are) your legal dependent(s). You are not filing a fraudulent Head of Household return while you are married. Your child(ren) is (are) legal resident(s) of the United States. You are not collecting AFDC. Nobody else is claiming you as a dependent.

** Assets outside the US.** I had financial accounts outside the U.S. that had a balance of $10,000 or more for even a minute during 2022. ***&/or*** I have assets outside the United States with a fair market value of $100,000 or more at the end of 2022 OR $150,000 or more during 2021 if filing jointly ($50,000/$75,000 if single). **FinCEN** Form 114 must be filed **electronically** by **DEADLINES** **05/15/2023 or with extension by 10/15/2023**. The FATCA (8938) form is filed with your personal return. Penalties for failure to file start at $10,000, up to 100% of the accounts.

**IMPORTANT! Health Insurance Coverage:**

**PLEASE MARK \_\_\_\_Yes: Everyone including dependents were covered ALL Year) and YES \_\_\_\_Premium Health INS with 1095-A**

**If you receive any of the following Health Coverage Forms (1095-A, 1095-B or 1095-C) please attach.**

**** I own rental real estate. Number of days Personal Use: \_\_\_\_\_\_\_\_\_ Fair Rental Days:\_\_\_\_\_\_\_

**** I have started a new business in 2022 and will provide you with the set-up documents and employer ID information.  
**** My estimated payments exceed $20,000/year. Help me set up an IRS EFTPS account to make deposits.

**** I am a Registered Domestic Partner in (State)\_\_\_\_\_ I must file a joint State return with my partner.

**Total cost of 2022 purchases made online or out of state or without paying sales tax. This must be reported on your State tax return.** For State Return **$\_\_\_\_\_\_\_ or Please mark \_\_\_ No, if none.**

**Note: There are IRS changes all year affecting your 2021-2022 tax returns. And may be a delay allowed for paying until later BUT NOT filing. Be prepared to still file extensions (AND PAY Estimated Taxes) by 4/18/2023 as usual. OR 5/15/23 in LA or Orange County, CA!**

►\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date \_\_\_\_\_

**Your Signature** Print your name

►\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date \_\_\_\_\_\_

**Your Spouse’s Signature** Print your spouse’s name