

Tax Year: 2022

Tax Worksheet

Date: _____

- 1. Name : _____ Cell: _____
- 2. Address: _____ City: _____ Zip _____
- 3. Email: _____
- 4. Filing Status: **Single / Head of household / Married Filing jointly / Married Filing Separate**
- 5. **Routing number:** _____
- 6. **Account number:** _____
- 7. Social Security: _____ 8. Occupation: _____
- 9 Dependents: **Yes / No** 10. Name of dependents: **Date of birth & social security:**

- 11. Donations: **Yes/ No** \$ _____ Name of organization: _____
- 12. Church tithes: **Yes /No** \$ _____ Name of church: _____
- 13. DMV Registration fees: **Yes/No** \$ _____
- 14. New car: **Yes/ No** (if, yes) sales price \$ _____ Car sales tax: \$ _____
- 15. Lottery or gambling winnings: **Yes /No** \$ _____
- 16. Medical Expenses: **Yes / No** \$ _____ Union Dues: **Yes/No** \$ _____
- 17. Social Security benefits: \$ _____ 18. California stimulus check: \$ _____
- 19. Unemployment benefits: \$ _____ (you)
- 20. Unemployment benefits: \$ _____ (spouse)
- 21. Homeowner: **Yes / No** (If, yes) Property tax \$ _____ Mortgage interest \$ _____

Only complete this section if you are self-employed

- 22. **Self-employed:** Income: _____ Equipment: \$ _____
- Supplies: \$ _____ Car: Mileage amount: _____ / Insurance \$ _____
- Cell phone: \$ _____ Uniforms/work shoes: \$ _____

Notes: _____

