

TAX YEAR ... 2022 ▶ Review, Sign, & Return ALL Pages in this checklist with your tax documents ◀

Taxpayer NAME _____ Mobile Phone () _____
 Taxpayer E-Mail _____ Home Phone () _____
 Spouse NAME _____ Mobile Phone () _____
 Spouse E-Mail _____ FAX () _____



I/we have gathered and submitted the information requested in this checklist & to the best of my/our knowledge it is true, correct, and complete.

➔ Taxpayer Signature **X** _____ Date **X** _____
 ➔ Spouse Signature **X** _____ Date **X** _____

▶ Reminder... “There is no such thing as a quick and/or easy tax question (or answer)!” 😞

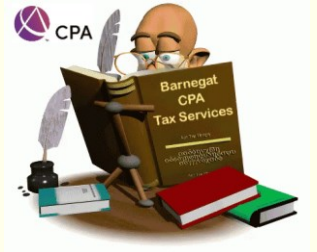
Checklist of Information Needed to Prepare Your Income Tax Returns
 Complete and accurate information is necessary to take advantage of all the tax deductions and credits to which you are entitled so that your tax liability is legally minimized. (Not all items apply to everyone & this is not an all-inclusive list)

The Preferred method of providing your documents - SECURE email/file uploads: <https://www.encyro.com/barnegatcpa>

* **Any item NOT provided will be considered a NO answer or ZERO** *

NEW CLIENTS only ... Provide the following information:

- Copies of your **2021** tax returns, OR... copies of the tax returns for the last year that you filed returns (Federal and all State returns).
- Date of Birth** and copies of **Social Security Cards** for Taxpayer, Spouse, and all Dependents.
- Copies of **Driver’s License** for Taxpayer and Spouse (or **State Identification Card** if not a driver).
- Signed copies of **Form 2848 “IRS Power of Attorney...”** if given to you by the CPA.



For **DIRECT DEPOSIT of tax refunds** into your bank account, or **ELECTRONIC FUNDS WITHDRAWAL of tax balances due...** Check this box if bank information is the same as last year, otherwise provide:

Bank Name _____, Type of Account: Checking Savings
 Bank Routing Number _____, and
 Bank Account Number _____ **OR provide copy of a CHECK**

ONLY if you have one... Provide **Identity Protection PINs (IP PIN)** that have been issued and sent to you by the Internal Revenue Service (IRS), or that you have voluntarily requested from the IRS ... This is a six-digit number that prevents someone else from filing a tax return using your Social Security number.

▶▶ **New IP PINs are issued every year** ◀◀ [Get An Identity Protection PIN | Internal Revenue Service \(irs.gov\)](https://www.irs.gov)

Taxpayer _____ Spouse _____

- Provide copies of these **IRS Transcripts** from your online IRS Account for **2022 & 2021** ... [Sign In \(irs.gov\)](#)
 - ACCOUNT Transcript of taxpayer**
 - WAGE and INCOME Transcript of taxpayer (only if your returns are on Extension since information for the current tax year may not be available until August)**
 - ACCOUNT Transcript of spouse, if applicable**
 - WAGE and INCOME Transcript of spouse, if applicable (only if your returns are on Extension)**
- ➔ ➔ Go here if you need to create an online IRS account... [Sign In \(irs.gov\)](#) ⬅ ⬅

- If you filed on your own for an **Extension of Time to File your tax returns (Federal Form 4868, New Jersey form NJ-630, or other state extension form)** ... provide a copy of each filed form **and** indicate the date filed.
- Provide copies of all notices received in the mail during the year from the Internal Revenue Service, NJ Division of Taxation, or the Division of Taxation of any other state.
Check this box if NO Tax NOTICES were received...
- Do you want to designate \$3 to the Presidential Election Campaign Fund? **Taxpayer** Yes No **Spouse** Yes No
- Are you legally blind? **Taxpayer** Yes No **Spouse** Yes No
- Did you pay anyone for domestic services in your home? Yes No

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ESTIMATED TAX PAYMENTS

- Amounts and Dates of **FEDERAL ESTIMATED TAX payments** made:
\$ _____ Date _____ \$ _____ Date _____ \$ _____ Date _____ \$ _____ Date _____
- Amounts and Dates of **NEW JERSEY ESTIMATED TAX payments** made:
\$ _____ Date _____ \$ _____ Date _____ \$ _____ Date _____ \$ _____ Date _____
- Amounts and Dates of **Other State ESTIMATED TAX payments** made... **STATE:** _____
\$ _____ Date _____ \$ _____ Date _____ \$ _____ Date _____ \$ _____ Date _____
- Amounts and Dates of **Other State ESTIMATED TAX payments** made... **STATE:** _____
\$ _____ Date _____ \$ _____ Date _____ \$ _____ Date _____ \$ _____ Date _____

- Was **EVERYONE** (taxpayer, spouse, dependents) on the return covered by Health Insurance **ALL** year?
Yes No --- If NO, please explain and provide details of who was covered, dates of coverage, dates of premiums paid, etc.
- Provide details for **NEW Dependents**, such as births, adoptions, parents, etc. (name, relationship, social security number, months lived with you during the year) _____
To determine who are your dependents... <https://www.irs.gov/help/ita/whom-may-i-claim-as-a-dependent>
- Explain changes in the status of any dependents claimed on last year's tax return (e.g., no longer a dependent, started college, not in college any longer) _____
- COLLEGE STUDENT dependents:** What year of college was each student enrolled in at the end of the year?

- Did any dependent file their own tax return this year? Yes No ... If YES, did they indicate on their tax return that you would be claiming them as a dependent on your return? Yes No
Name of dependent(s) _____

- W-2** forms (all copies), AND the **Final Pay-Stub** for the year for each of your employers.
If you worked in more than one state (or country), provide days worked in each state (or country):
NJ- _____ days; NY- _____ days; PA- _____ days; CT- _____ days; DE- _____ days; **Other State/Country**- _____ - _____ days

- IRS “1099” and “5498” forms:**
 - 1099-A**, Acquisition or Abandonment of Secured Property
 - 1099-B**, Proceeds From Broker and Barter Exchange Transactions
 - 1099-C**, Cancellation of Debt
 - 1099-CAP**, Changes in Corporate Control and Capital Structure
 - 1099-DIV**, Dividends and Distributions
 - 1099-G**, Certain Government Payments (also refer to the New Jersey section at the end of this checklist)
 - 1099-H**, Health Coverage Tax Credit (HCTC) Advance Payments
 - 1099-INT**, Interest Income
 - 1099-K**, Merchant Card and Third Party Network Payments
 - 1099-LS**, Reportable Life Insurance Sale
 - 1099-LTC**, Long-Term Care and Accelerated Death Benefits
 - 1099-MISC**, Miscellaneous Income
 - 1099-NEC**, Nonemployee Compensation
 - 1099-OID**, Original Issue Discount
 - 1099-PATR**, Taxable Distributions Received From Cooperatives
 - 1099-Q**, Payments From Qualified Education Programs (Under Sections 529 and 530)
 - 1099-QA**, Distributions from ABLE Accounts - Achieving a Better Life Experience savings account
 - 5498-QA**, ABLE Account Contribution Information
 - 1099-R**, Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.
 - 5498**, Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.
 - 1099-S**, Proceeds from Real Estate Transactions
 - 1099-SA**, Distributions From an HSA, Archer MSA, or Medicare Advantage MSA
 - 1099-SB**, Seller's Investment in Life Insurance Contract

- IRS “1098” forms received:**
 - 1098**, Mortgage Interest Statement
 - 1098-C**, Contributions of Motor Vehicles, Boats, and Airplanes
 - 1098-E**, Student Loan Interest Statement
 - 1098-F**, Fines, Penalties and Other Amounts
 - 1098-MA**, Mortgage Assistance Payments
 - 1098-Q**, Qualifying Longevity Annuity Contract Information
 - 1098-T**, Tuition Statement

- Form SSA-1099, Social Security Benefit Statement...**
 - How much of the Taxpayer’s Medicare **B** premiums were reimbursed? \$ _____ By whom? _____
 - How much of the Spouse’s Medicare **B** premiums were reimbursed? \$ _____ By whom? _____
 - How much of the Taxpayer’s Medicare **C** premiums were reimbursed? \$ _____ By whom? _____
 - How much of the Spouse’s Medicare **C** premiums were reimbursed? \$ _____ By whom? _____
 - How much of the Taxpayer’s Medicare **D** premiums were reimbursed? \$ _____ By whom? _____
 - How much of the Spouse’s Medicare **D** premiums were reimbursed? \$ _____ By whom? _____

- Form RRB-1099, Payments by the Railroad Retirement Board**
- Form RRB-1099-R, Annuities or Pensions by the Railroad Retirement Board**

- Details of **Tax-Exempt** income received, e.g., Municipal Bond Interest, Child support, Alimony-Not taxable for divorce/separation agreements finalized after 12/31/2018, etc.

- Forms **1095-A** (for Health Insurance Marketplace premiums & advance premium tax credits).
NOTE: Forms 1099-B or 1099-C are NOT needed to prepare your tax return.
- Forms **K-1** and **ALL attachments** (for partnerships, subchapter-S corporations, estates, and trusts).
- In addition to the **Form 1099 tax statements** from BROKERAGE and MUTUAL FUND accounts, provide **ALL** pages and information received with the Forms 1099, including any AVERAGE COST STATEMENTS received from a Mutual Fund for the sale of fund shares.

- ITEMIZED DEDUCTIONS** – Provide LISTS of other expenditures incurred and paid for:
 - Unreimbursed (**Out-Of-Pocket**) Medical, Drug, Dental, Eye Care expenses, Health & Long-Term Care Insurance premiums paid, plus...
Medical travel-auto mileage _____ miles, Tolls \$ _____ Parking \$ _____
Review IRS Publication 502-Medical and Dental Expenses:
<https://apps.irs.gov/app/picklist/list/formsPublications.html>
 - Real Estate taxes **PAID** in **2022** (primary home, 2nd home, land), **including Prepayments for 2023**.
 - NEW JERSEY Real Estate/Property Tax Rebates** received:
 - **ANCHOR Program** ... both Homeowners & Tenants [**NOT APPLICABLE FOR 2022 tax returns**]
 - CHECK amount you received = \$ _____
 - **HOMESTEAD BENEFIT** (amounts of CREDITS you received on your Property Tax Bill).
[NJ Division of Taxation - Homestead Benefit Program - Check the Status of your Homestead Benefit \(state.nj.us\)](http://NJ Division of Taxation - Homestead Benefit Program - Check the Status of your Homestead Benefit (state.nj.us))
 - \$ _____ (2018 benefit/credit on your tax bill received in 2022)
 - **SENIOR FREEZE-Property Tax Reimbursement:** CHECK amount you received = \$ _____
[Property Tax Reimbursement Inquiry - NJ Taxation \(state.nj.us\)](http://Property Tax Reimbursement Inquiry - NJ Taxation (state.nj.us))
 - Mortgage Insurance Premiums paid in **2022** for insurance contracts entered into after 2006 = \$ _____
 - Interest paid to *other than* financial institutions on your primary residence, second home, land, etc., e.g., paid to individuals, partnerships (provide their Social Security Number or other tax ID number).
 - Interest paid on a loan for a Boat or RV that has living quarters... provide details.
 - Charitable Contributions** paid by **cash/check/credit card** \$ _____ (keep receipts in your records with your tax return and a list showing totals by charity).
 - Number of miles driven for delivering cash donation for charitable purposes = _____ miles
 - Charitable related out-of-pocket expenses (supplies, etc.) = \$ _____
 - Current Market VALUE** of **NON-cash charitable contributions** of personal items that are new or in good used condition (clothing, furniture, household items, etc.) to recognized charities \$ _____
 - Number of miles driven to make the non-cash donations = _____ miles.
NOTE: If the value of all non-cash donated items is **over \$500**, for **each donation date** provide a LIST with: **(1)** Date donated, **(2)** Value of donated items, **(3)** Description of items donated, and **(4)** Donee's name & address. Copies of receipts are not needed, but keep the receipts with your tax return in case of an audit.
...Provide copy of an **Appraisal Report** if the value of a donated item is over **\$5,000**.
 - SALES TAX...** *If available*, provide the total sales tax paid on **EVERYTHING** you purchased during the year.

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- RENTAL PROPERTY:** Income, Expenses, and Capital Improvements... list separately for each property owned. Include business use of automobile information. A separate schedule is available to assist you-request it if wanted.
 - SELF-EMPLOYMENT:** Income, Expenses, and Capital Expenditures (vehicles, equipment, buildings, etc.) for each business owned and organized as a **Sole Proprietorship** or **Single Member Limited Liability Company (SMLLC)**. A separate schedule is available-request it if wanted.

IMPORTANT: Your Certified Public Accountant (CPA) is not auditing your expenses (that's the job of the IRS), so do not provide any actual bills, receipts, or cancelled checks, except as noted in each section.

Just provide **“the numbers”**★ and only provide YEARLY totals for each category of expense. That is, do NOT provide a pile of medical bills and receipts and insurance statements and expect your CPA to sort through them to determine your allowable medical deduction, unless you are willing to pay for this additional service!

★ **“the numbers”** means specific numbers for deductions you are claiming. Saying “claim the maximum” or “whatever I am allowed” or “same as last year” is **not appropriate**. The maximum is what you actually paid – and you are allowed to deduct what you actually paid! For example, tell your tax preparer “\$1,099.50” or “\$25.00 per week for 50 weeks” or “4,117 miles”.

If any of the following situations apply to you, additional information is needed:

If you donated to a charity using a Qualified Charitable Distribution (QCD) (a direct transfer of funds from your IRA made by the trustee, payable directly to a qualified charity) – provide the **Amounts** and **Dates** of each transfer, and documentation from the charity supporting each charitable donation. <https://www.irs.gov/publications/p590b>

If you SOLD STOCK, BONDS, and/or MUTUAL FUND SHARES – the date of purchase and cost of all investments sold. This information may be included in the Year-End Consolidated Form 1099 Statement you received from the Brokerage Firm or Mutual Fund house. If cost basis information for all trades is not included on this statement, have your broker provide you with a “profit and loss” report for all the year’s trades that reconciles to the Form **1099-B** for each account.

If you sold an investment you **inherited**, provide (1) Date of death of the person from whom the investment was inherited, (2) Number of shares or other details of what you inherited, and (3) Value of the shares, or other investment, on the date of death.

If you had any investments that became WORTHLESS, or were the victim of investment theft in 2022 – provide complete details.

If you were granted or exercised EMPLOYEE STOCK OPTIONS in 2022 – provide documents supporting the transactions.

If you had VIRTUAL CURRENCY (BITCOIN, Etc.) TRANSACTIONS – At any time during the year, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? Yes No If YES, provide complete details of all transactions, including transaction dates & amounts, and how obtained (mining, purchase, in exchange for goods/services, etc.).

If, at any time during 2022, you had a financial interest in or signature authority over a financial account, such as a bank account, securities account, or brokerage account) located in a FOREIGN COUNTRY – Did the aggregate value of ALL of the accounts exceed \$10,000 on ANY date during the calendar year?

Yes No

If YES, provide details for each account...

1-Name of the Foreign Country, 2-Name on the account, 3-Account number, 4-Name and address of the foreign bank, 5-Type of account, and 6-Maximum value on any day during the year.

[Report of Foreign Bank and Financial Accounts \(FBAR\) | Internal Revenue Service \(irs.gov\)](#)

- If, at any time during 2022, did you receive a distribution from, or were you the grantor of, or transferor to, a FOREIGN TRUST?** Yes No ... If YES, you may have to file Form 3520 [About Form 3520, Annual Return To Report Transactions With Foreign Trusts and Receipt of Certain Foreign Gifts | Internal Revenue Service \(irs.gov\)](#)

 - If you MOVED during 2022** – provide all addresses where you lived **and** the dates lived at each address:

 - If you SOLD REAL ESTATE** – the ALTA (American Land Title Association) Settlement Statement (which has replaced the HUD-1 form), other closing document showing all closing costs, or the HUD-1 form... for **both** the purchase **and** sale of the property, PLUS a LIST of the cost of major improvements made to the property since it was purchased (e.g., new roof, furnace, driveway, fencing, adding a sunroom, finishing a basement, etc.) and any expenses of sale paid separate from the closing and not appearing on the Settlement Statements.

 - If you SOLD a HOME**, and previously claimed the **First-Time Homebuyer Tax Credit** when it was purchased... provide details _____

 - If you PURCHASED REAL ESTATE** – the ALTA (American Land Title Association) Settlement Statement (which has replaced the HUD-1 form) showing the closing costs details for the purchase of the property, or other closing document showing all closing costs. For rental property, provide the separate amounts of “assessed value” for land and improvements/building from the tax bill.

 - If you added someone to the DEED of your HOUSE or a second home** ... provide details.

 - In the FIRST YEAR you take an IRA (Individual Retirement Account) Distribution**
 - For EACH IRA account, provide where the money came from to deposit into the account when it was originally opened.

 - If you RECEIVED IRA (Individual Retirement Account) DISTRIBUTIONS** – year-end statements for all IRA accounts, Forms **1099-R** and **5498**. Need the value of each IRA as of **JAN 1st** and **DEC 31st** of the tax year.

 - If you RECEIVED a DISTRIBUTION from one or more PENSION PLANS, e.g., a 401(k) plan** – did you ROLL OVER any the distributions to an IRA, or “take the money and run”?

 - If you have a MORTGAGE, 2nd MORTGAGE, HOME EQUITY LOAN, or LINE of CREDIT (HELOC):**
 - Were all proceeds of all loans used to buy, build, or substantially improve the property/house purchased?
Yes No If **NO**, provide the following...
A detailed analysis, including... 1-amount and date(s) of loan(s), 2-month of first payment, 3-current year beginning and ending principal balances, and 4-current year interest paid of:
 - “Acquisition Debt”** (money borrowed to buy, build, or substantially improve the property), and
 - “Home Equity Debt”** (money borrowed for any other reason, and any closing costs for refinancing that was added to the loan principal) for your primary residence and any personal-use vacation residences going back to the initial purchase mortgage for each property.
- ... We need to know how the proceeds/cash received of each loan was used ...**

- If you REFINANCED A MORTGAGE** – the ALTA (American Land Title Association) Settlement Statement (which has replaced the HUD-1 form) showing the details of the closing costs for the refinance and the term/length of the new loan. If you took cash out... explain what was done with all of the cash, such as home improvements, new car, medical expenses, etc. _____
-
- If you CONTRIBUTED to a RETIREMENT PLAN** – Details of all CONTRIBUTIONS made to these plans: Traditional IRA, ROTH IRA, Individual 401(k), ROTH 401(k), SEP (Simplified Employee Pension) plan, SIMPLE Retirement Plan, and/or Keogh plan, including the contribution dates.
- If you are PAYING or RECEIVING ALIMONY** (*ignore this section if your divorce decree or agreement was executed after December 31, 2018*) – the DATE of the Divorce Decree/Document ____ / ____ / _____, the Social Security number of your ex-spouse ____ - ____ - _____, the amount of **alimony paid** \$ _____ or **alimony received** \$ _____ in the tax year, and details any other required payments per the divorce decree, such as health or other insurance premiums and real estate expenses, that you are making on behalf of your ex-spouse (provide details) _____
-
- If you DONATED a CAR/TRUCK to CHARITY** – all the paperwork you received from the charity, especially the IRS Form 1098-C they should have given you, plus the original cost and date of purchase of the vehicle.
- If you PURCHASED a CAR, TRUCK, SUV, MOTORCYCLE, BOAT or AIRPLANE**
- Amount of SALES TAX paid on the vehicle \$ _____.
(If used fully or partially for business, provide the sales invoice).
- ELECTRIC, HYBRID, and PLUG-IN HYBRID (PHEV) vehicles purchased...**
Provide details (year, make, model, purchase cost, date purchased).
- If you incurred a CASUALTY LOSS in a “Federally-Declared Disaster Area”** – provide details.
- If you have GAMBLING WINNINGS** – all Forms W-2G and details of all your gambling winnings and losses, regardless of the “category/type” of gambling, plus **any gambling log you kept**. Split out winnings and losses.
- Review IRS Publication 529-Miscellaneous Deductions: <https://www.irs.gov/pub/irs-pdf/p529.pdf>
<https://apps.irs.gov/app/picklist/list/formsPublications.html>
- If you have DEPENDENTS IN COLLEGE** – all Forms 1098-T received from the college AND the “Bursar’s Reports” for the year that show actual tuition and other payments made to the school during the year. You may be able to print a financial report from the college’s website. Separately provide what was spent on course-related books, supplies, and equipment and the cost of room and board. If you have taken a distribution from a Section 529 Qualified Tuition Program provide form 1099-Q and other documentation related to the withdrawal.
- If you PAID for CHILD CARE, whether DIRECTLY or THROUGH A FLEXIBLE SPENDING ACCOUNT** - the name, address, Social Security or Employer Identification number, and amount paid for each child-care provider. If you have more than one child, identify how much was paid for each child. You should be able to obtain detailed statements from each provider.
- If you PURCHASED an ENERGY-EFFICIENT PRODUCT for your HOME** – a description of the items you purchased, the purchase price, and a Manufacturer’s Certification or confirmation that the purchase qualifies. Please independently verify that your purchase qualifies for the credit. (e.g., insulation, exterior windows/doors, roof that exceeds Energy Star program requirements, heating/cooling systems, solar energy, solar water heating, fuel cell property, small wind energy, or a geothermal heat pump).

- If you have Unreimbursed Qualified Educator (K-grade 12) Expenses ...** provide the total amounts paid:
 Taxpayer \$ _____ Spouse \$ _____

You're considered an eligible educator if, for the tax year you're a kindergarten through grade 12 teacher, instructor, counselor, principal, or aide for at least 900 hours during a school year in a school that provides elementary or secondary education as determined under state law.

- Total **TIP income** received \$ _____ and Tip income **not reported** to employers \$ _____

- MISCELLANEOUS INCOME** - provide amounts and details related to:

- | | | |
|--|--|---|
| <ul style="list-style-type: none"> <input type="checkbox"/> Income received from an installment sale <input type="checkbox"/> Jury duty pay <input type="checkbox"/> Bartering income <input type="checkbox"/> Internet Sales – eBay, etc. <input type="checkbox"/> Debt cancellation, including credit cards (Form 1099-C) <input type="checkbox"/> Bankruptcy <input type="checkbox"/> Foreclosure <input type="checkbox"/> Repossession | <ul style="list-style-type: none"> <input type="checkbox"/> Prizes won <input type="checkbox"/> Money received from a state’s Unclaimed Property Administration division <input type="checkbox"/> Income from personal property rented <input type="checkbox"/> Buried treasures found <input type="checkbox"/> Money found in a parking lot <input type="checkbox"/> Income from illegal activities (e.g., dealing illegal drugs) | <ul style="list-style-type: none"> <input type="checkbox"/> Fair Market Value of property you have stolen and not returned to the owner in the same calendar year <input type="checkbox"/> Any other income received: Explain _____

 _____ |
|--|--|---|

(These items may, or may not, be taxable)

- MOVING Expenses...** only if you are a **member of the Armed Forces on ACTIVE DUTY** and, due to a military order, you move because of a permanent change of station... include transportation & storage of house goods, travel, & lodging along the way. (Form 3903 & instructions).
- ADOPTION** expenses paid (provide complete details). www.irs.gov/taxtopics/tc607
- Provide details of cash or property **CUMULATIVE GIFTS** to a donee made during the course of the calendar year to *other than charitable organizations* (to children, relatives, friends, acquaintances, etc.) by **each** individual taxpayer and spouse of **more than \$16,000, (increases to \$17,000 in 2023)** to one or more people (directly or in trust)—for Gift Tax return preparation on which no tax is generally due:
 [1] who made the gift (donor), [2] who received the gift (donee), [3] amount of gift, [4] donee’s name and address, [5] donee’s relationship to donor, [6] description of the gift and other pertinent details.
- USE TAX...** Provide details of items purchased out of the country or in a state other than your home state during the year, which were brought back to and used in your home state and **(1)** on which *NO sales tax was paid*, OR **(2)** if the other state’s tax paid was at a rate lower than your home state’s Sales Tax Rate (in NJ the rate was **6.625%**). Include only items which would have been subject to your home state sales tax if purchased in your home state, e.g., exclude clothing if home state is NJ. Include purchases made over the internet on which no sales tax was paid, or purchases made while on vacation in a state that has no sales tax or a lower sales tax rate than your home state.
...If you do not provide any of the above USE TAX information, you are certifying that no Use Tax is due...
- If you received MONEY or PROPERTY from the “New Jersey (or other state) Unclaimed Property Administration”** – provide details of principal and interest amounts of cash received, value of property received, where the money came from, and for what, etc.).
 Go here... <https://unclaimedfunds.nj.gov/app/claim-search> to do a search to see if the state is holding any of your money and how to file a claim to recover it.
 Also, do searches on the internet in other states, just google **“Any other state name-unclaimed property”**.
 Do searches in every state you have ever lived or had a business... use maiden names, names of relatives, your businesses, etc.
Note: a portion (or all) of what is recovered may, or may not, be taxable.

*** For **NEW JERSEY** Taxpayers **ONLY** ***

- If you **OWNED** a **HOME** on **October 1st** – Block # _____ Lot # _____ Qualifier # _____
- If you **RENT** an **APARTMENT** (or other **PRIMARY** Residence) – Rent paid for the year \$ _____

- Is Taxpayer a Military **VETERAN**? Yes No
- Is Spouse a Military **VETERAN**? Yes No

If **YES**, then for **NEW JERSEY**, an honorable discharge document must be provided to the state of New Jersey if not provided in a prior year, e.g., **DD Form 214, Certificate of Release or Discharge from Active Duty**.

- Do you want to designate **\$1** to the Gubernatorial Elections Fund?
Taxpayer... Yes No Spouse... Yes No
- Statements of **NJ State Income Tax Refunds AND Unemployment Income** received (**Form 1099-G**) are accessible **ONLINE only**. To view and print your statement, login to the online service at...
 - o [New Jersey 1099-G Inquiry \(state.nj.us\)](http://state.nj.us)
 - o or <https://nj.gov/labor/myunemployment/>
 - o or <https://nj.gov/labor/myleavebenefits/labor/myleavebenefits/help/taxforms.shtml/>

- Wounded Warrior Caregivers Credit...** Did you provide care for a relative who lived with you in NJ for at least 6 months of the tax year and has a disability arising from active U.S. military service in any war or conflict on or after September 11, 2001?
Yes No If Yes, let us know... additional information will be required.

- Gold Star Family Counseling Credit...** If you are a **mental health care professional** who provided counseling through the Gold Star Family Counseling program:
 - Number of hours of counseling you provided through the program: _____ hours
 - TRICARE rate** for the service: \$ _____ per hour

- You can make a **CHARITABLE DONATION** to one or more of the following charities. The amount you donate will reduce your NJ refund *or* increase your NJ balance due. The amounts will be deductible on your next year's Federal income tax return. Check off the organization and insert the amount you wish to donate via your NJ income tax return...
 - \$ _____ Endangered Wildlife Fund
 - \$ _____ Children's Trust Fund
 - \$ _____ Vietnam Veterans' Memorial Fund
 - \$ _____ Breast Cancer Research Fund
 - \$ _____ U.S.S. New Jersey Educational Museum Fund
- Also, you may donate to up to **THREE (3)** additional charities. Go here to see those charities and for more information on the charitable funds ... <https://www.state.nj.us/treasury/taxation/1040charitablefunds.shtml>
Provide the amount and name of charity:
 - \$ _____
 - \$ _____
 - \$ _____

► For more details & explanations of **...NEW JERSEY... Income, Expenses, & Deductions...**
NJ-1040 Return and Instructions: [2022 Instructions for the NJ-1040 \(state.nj.us\)](http://state.nj.us)

► For more details & explanations of **...FEDERAL... Income, Expenses, & Deductions...**
PUBL 17 (and other IRS publications): <https://apps.irs.gov/app/picklist/list/formsPublications.html>
