

Greetings! I hope you have had a great 2022 and wish you the best in 2023!

I have uploaded the "2022 Tax Season News" to my website www.promgmtinc.com. You may scan the QR code to the right to automatically be directed to this year's newsletter. If you do not have access to the internet and would like a copy, please let me know and I will mail it to you. It has information about this tax filing season. For business owners, please see the newsletter for important information regarding mileage/auto expenses for 2022.



A few key notes:

- All meetings (in person or Zoom/FaceTime) are by appointment only and must be scheduled in advance. I am always available by email and telephone. *If you do not have a scheduled appointment, please use my drop box.*
- Documents can be provided on my client portal, dropped off or mailed. If you are a returning client, I do not need last year's tax return and please open/discard all envelopes before providing your info.
- The newsletter has due dates and when documents need to be received by Pro Management to ensure timely filing/avoiding filing for extensions.
- It is VERY important to be sure you have all required information before dropping off documents. Re-dos/reprints of tax returns will incur a fee, based on time spent on the changes/reprints/re-uploading.

Please include this completed sheet with your tax information. It includes important information needed to ensure accurate preparation and filing of your 2022 returns. Engagement letters will be included with your e-file forms this year.

Best Regards,

Dottie

2022 Tax Information Sheet

NOTE: Returns cannot be filed until e-file forms and engagement letters have been signed (by spouses as well, if applicable) and tax preparation fees have been paid. There will be NO exceptions.

Name	
Phone	
Email Address	

No changes have occurred since 2021 return was filed.

OR

Changes have occurred since 2021 return was filed (please advise changes with documents or via email).

Health Insurance (check all that apply): Note: This section applies to ALL Massachusetts residents

I/we had private insurance coverage for all 12 months of 2022. I/we will be providing proof of insurance.

I/we had either Tri Care or Medicare for all 12 months of 2022.

I/we only had health insurance for a portion of 2022. Please explain (which months did you have coverage?):

I/we did not have health insurance in 2022.

E-Filing Information:

Yes, e-file my return using the following method for receiving my refund/paying tax due.

Direct deposit or of refund **or withdrawal** of tax due.

Bank Name		
Account Type (please circle)	Checking	Savings
Routing Number		
Account Number		

Have **paper check** sent for refund **or provide vouchers** for mailing in tax due.

Electronic Copy Return Request (in addition to paper copy):

Please provide a copy of my returns on the CCH iFirm Client Portal for a \$5 fee/return (includes federal and state).

Return of Tax Return Preference:

I will pick up my return.

Please return documents/tax returns via mail - In order to keep costs as low as possible for all customers, anyone that chooses to have their returns mailed to them will have the cost of the postage added to their invoice. I encourage you to pick up your return whenever possible (local clients) as last year several were lost by USPS.

Virtual Currency (i.e. crypto, etc.):

All taxpayers must answer this question: At any time during 2022, 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)? (See instructions.) Yes No

Rent Paid

If you are a MA resident and pay rent, please include the total rent paid in 2022 = \$ _____

Circuit Breaker Credit

If you are a MA resident, 65 years of age or older, you may be eligible for the circuit breaker credit. Please include the following information so I can determine if you are:

Total real estate taxes paid in 2022 = \$ _____

Total number of acres owned = _____ (credit only available for certain number of acres)

Estimated Tax Payments

If you are a taxpayer who makes estimated tax payments during the year, please provide either the following information or copies of cancelled checks/bank statements. This back up is required in order to put estimates on your return.

Estimate 1 – Date paid _____ Ck # _____ Amount \$ _____
Estimate 2 – Date paid _____ Ck # _____ Amount \$ _____
Estimate 3 – Date paid _____ Ck # _____ Amount \$ _____
Estimate 4 – Date paid _____ Ck # _____ Amount \$ _____