

Burlington Business Solutions LLC  
Jennifer R. Hodder EA PH:6092672880 FAX:6092672083 EMAIL: hodderbubuso@comcast.net  
Information to bring to your tax appointment or include in your drop off or email

1	1. If your tax return was not prepared by Burlington Business Solutions LLC you must must provide the following: Please provide a copy of 2022 Tax Return and Social Security Cards. All clients must bring Driver Licenses															
2	2. Please Provide Contact Number and Email Address: <div style="border: 1px solid black; height: 20px; width: 100%;"></div>															
3	<table border="1" style="width: 100%; border-collapse: collapse;"><thead><tr><th style="width: 10%;">Name</th><th style="width: 30%;">Social Security #</th><th style="width: 60%;">Date of Birth</th></tr></thead><tbody><tr><td>TaxPayer</td><td></td><td></td></tr><tr><td>Spouse</td><td></td><td></td></tr><tr><td>Child</td><td></td><td></td></tr><tr><td>Child</td><td></td><td></td></tr></tbody></table>	Name	Social Security #	Date of Birth	TaxPayer			Spouse			Child			Child		
Name	Social Security #	Date of Birth														
TaxPayer																
Spouse																
Child																
Child																
4	4. Occupation <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div>															
5	5. Day Care Provider <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div>															
6	6. Did you ,your spouse or dependent take any higher education courses in 2022? <div style="border: 1px solid black; height: 20px; width: 100%;"></div>															
7	7. E-file information: Bank Name <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div>															
8	8. All W2's for both taxpayer and spouse															
9	9. Did taxpayer or spouse receive any funds from a pension or Annuity? (1099-R)															
10	10. Did you receive a Homeowner Rebate or a State Refund for 2022?															
11	11. All 1099INT and 1099DIV for Interest/Dividends															
12	12. Did taxpayer or spouse collect unemployment in 2022? Extra Unemployment Stimulus Received? (This form will no longer be mailed- please print off State of NJ Website 1099 G)															
13	13. Did taxpayer or spouse receive any social security benefits in 2022? (If YES bring SSA-1099)															
14	14. Does taxpayer or spouse have any business on the side? (If you accept any electronic payments please bring in 1099-K) PayPal Facebook Market Place Venmo etc. over \$600.00.															
15	15. If you have a business do you use a room in your home for an office?(only for Schedule C or 1099 Contractors) <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div>															
16	16. Do you own rental properties? (If YES bring all rental information) All Rental owners are required to issue 1099's for service work.															
17	17. Are you a partner in a business or do you have any affiliation with a corporation? (If Yes bring K-1)															
18	18. At any time during 2022 did you:(a) receive(as a reward, award, or payment for propertyor services);or (b) sell,exchange, gift,															

or otherwise dispose of a digital asset (or financial interest in digital asset)?  
(If yes bring 1099B, Must have original purchase date, original purchase price, date of sale price for each transaction sheet.)

**19. Did you buy/sell your home?**

(Bring Original settlement sheet from the purchase of the home just sold.  
Bring a list of any improvements and cost made over the years you owned your home.)

**20. Did you have any gambling winnings?**

(If Yes bring all W-2G's)

**21. Medical Expenses: Doctors, Dentists, Pediatricians, etc.(1095A, 1095B or 1095C)**

**Pharmacy, Medical supplies, and insurance costs. Please bring form 1095A for Market Insurance.**

**Healthcare cost, if you paid more than 50% for healthcare credit.**

**Do you have health care coverage?**

**22. Do you own your home?**

Mortgage Interest:

Real Estate Taxes:

PMI:

Foreclosure/Bankruptcy:

Home Equity Loans

**23. Any out of state purchases? These items are subject to NJ USE TAX.**

**24. Contributions or donations in the form of cash or check?**

Recipient: Amount:

Recipient: Amount:

**25. Contributions or donations in the form of food, clothes, household items, Etc.?**

Recipient: Amount:

Recipient: Amount:

**26. Did you make any estimated tax payments for the year 2022?**

**27. If you are a renter, what is the total rent paid in 2022?**

**28. If you have been a victim of tax scam and reported it to the IRS you MUST BRING YOUR PIN to E-file your 2022 tax return.**

**29. Please bring a copy of DD214 for Veterans exemptions ( Only for veterans that did not apply previous)**

**You do not have to reapply each year.**

NJ Deduction has a 6500 for 2022

**30. Did you have any Foreign Income for 2022?**

**31. Residential Renewable Energy Tax Credit ( Solar, Wind,Geothermal, and Fuel-cell Technology)**

**32.New electric car tax credit upto \$7500.00 ( Income Limitation Single 150,000 Jointly 300,000)**

For NJ Taxpayers who do not have health insurance please apply for a exemption:  
<https://nj.gov/treasury/njhealthinsurancemandate/exemptions.shtml>