

ANDERSON, LARKIN & CO., P.C.
2022 AUDIT PROTECTION PLAN FOR
INDIVIDUAL INCOME TAX RETURNS

The number of notices generated by the IRS and State Departments of Revenue and Finance to taxpayers has increased dramatically. This is the result of their increasing ability to use computers to crosscheck information from a variety of sources. This has allowed government agencies to generate an overwhelming number of questions for taxpayers in addition to nuisance mail. Many of the notices are incorrect; however, it still takes a considerable amount of time to respond to the notices and determine their validity. As you may already know the resolution of these inquires and audits can be costly to you as a taxpayer.

To alleviate this cost burden, we are offering the 2022 Audit Protection Plan (For individual income tax returns only). For a fee of \$110, we will handle all correspondence to resolve letters of inquiry relating to your 2022 federal and state individual tax returns on your behalf at no charge.

If your 2022 federal or state income tax returns should be audited, Anderson, Larkin & Co., P.C. will represent you up to and including the appeals level at no charge.

Whenever you receive an audit notice or letter of inquiry from the federal or state government relating to your 2022 income tax returns, simply send it to us and authorize us to represent you. If you chose not to purchase audit protection, Anderson, Larkin & Co. P.C. will still represent you, but there will be a fee.

Our audit protection plan could save you a substantial amount of money in terms of services and fees. This is optional, so regardless if you do or do not take advantage of the plan, as a valued client, we will still service these audits and inquires. However, if we do provide the services specified above and you have not purchased the 2022 Audit Protection Plan, you will be charged based on our standard hourly rates for our services. Fees for representation at an average audit will generally total \$1,000 to \$10,000.

HOW TO PURCHASE THE PLAN:

To elect the plan simply sign this form and check the accept box, and return it to Anderson, Larkin & Co. P.C. If you do not wish to take advantage of this plan simply check the decline box, and sign and return the form. This ensures that all clients have been informed of the 2022 Audit Protection Plan.

Upon accepting the plan you will see a \$110 fee for the Audit Protection Plan on your next invoice. When you pay the \$110, you are automatically enrolled in the plan. Your payment constitutes a binding agreement for this service. The deadline for enrolling this plan is October 15, 2023.

Signature _____

Print Name _____

Accept

Decline

Please note: You are, of course, responsible for maintaining adequate records and making them available to us so that we can properly represent you before the taxing authorities. Similarly, you are liable for any additional taxes, penalties or interest that may eventually be assessed. This Audit Protection Plan applies only to individual income tax returns for 2022 and does not cover corporate, partnership, payroll or other tax returns.

ANDERSON, LARKIN & CO. P.C

**221 N WAPELLO ST
PO BOX 533
OTTUMWA, IA 52501
TELEPHONE 641-684-5489
FAX 641-683-1665**

**WE ARE ACROSS
FROM SONIC ON HWY 63**

2022 INCOME TAX DATA SHEET

This data sheet will aid you in organizing your 2022 individual federal and state income tax information. The list is by no means all-inclusive; therefore, any unusual income or expenditures should be brought to our attention. If you think any event or activity might have a possible influence on your tax return, tell us about it so we may consider it.

I/We understand that we are responsible for the accuracy of the information contained on these forms and other information provided to you. I/We further understand that the responsibility of Anderson, Larkin & Co. P.C. is limited to information contained herein or any other data supplied by us. I/We further maintain that a careful review of the completed tax return will be made by me/us before the return is filed. By signing the completed tax returns, I/we are confirming these conditions.

If you would like to have your refund directly deposited into your account, please attach a voided check.

PERSONAL INFORMATION

Please complete name & only those items that have changed since last year

TAXPAYER

SPOUSE

S.S. Number _____	S.S. Number _____
Name _____	Name _____
Occupation _____	Occupation _____
Date of Birth _____	Date of Birth _____
Work Phone No. _____	Work Phone No. _____
E-Mail Address _____	E-Mail Address _____

Address _____ City _____ State _____ Zip Code _____
Home Phone Number _____ **Cell** Number _____
 School District _____ County _____

Dependents (We must have social security numbers for all dependents).

<u>Name</u>	<u>Date of Birth</u>	<u>S.S. Number</u>	<u># of Months lived w/ you in 2022</u>	<u>Can you claim them?</u>
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

If any of the above dependents did not live with you due to divorce or separation, you must provide a completed Form 8332 (Custodial Parent Release Form).

ADDITIONAL INFORMATION

If you have a self-employed business or rental activity our office has worksheets we will provide you if requested.

IOWA DEDUCTIONS

IRA(s):

You (Roth? Y/N) \$ _____
 Spouse (Roth? Y/N) _____

Iowa Tuition and books (Registration, Activity fees)
 (K-12 only) Separate Amounts Per Child
 Early Childhood Dev. Credit (Income under \$90,000)
 Ages 3-5 (Preschool, books, supplies & activities) Per
 child

ITEMIZED DEDUCTIONS

Medical and Dental Expenses

Medicare Insurance \$ _____
 *Other **Medical Insurance** _____
 *Nursing Home Insurance _____
 Medical Miles _____
 Medical expenses _____

Gifts to Charity:

Total Paid by Cash or Check \$ _____
 Contributions greater than \$250
 must be supported by a receipt
 Non-Cash Contributions
 (If over \$500 Attach Receipts)
 (If \$5,000 or more Attach Appraisal)
 _____ charity

Taxes You Paid:

Real Estate Taxes _____
 Car Registration _____

Other Miscellaneous Deductions:

Gambling Losses (only with _____
 Gambling Income)

Interest You Paid:

Home Mortgage (From Form 1098) _____
 Other Home Mortgage-See Note _____
 Investment Interest _____
 Private Mortgage Insurance _____

Note: Home Equity Interest is now only deductible if you used the loan funds on your home.

RESIDENTIAL ENERGY CREDITS

Qualified solar, wind, solar water, fuel cell, and geothermal energy system costs for your main home located in the
 United States paid in 2022. \$ _____

ESTIMATE INFORMATION

List payments of 2022 estimated income tax. Include the fourth payment which is not due until January 2023

<u>Federal</u>		<u>State</u>	
<u>Date</u>	<u>Amount</u>	<u>Date</u>	<u>Amount</u>
_____	\$ _____	_____	\$ _____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

If you paid any additional tax on any prior returns, other than the amount as shown on last year's return please note the amount paid. _____

Did you buy, sell, or exchange any virtual currency in 2022 (ex:bitcoin)? YES NO

Do you have financial interest or signature or other authority over any foreign financial bank accounts with an aggregate amount of \$10,000 or more? YES NO

Are you a volunteer firefighter, EMS Personnel or Reserve Peace officer? YES NO

If yes, please attach a written statement from your supervisor.

EDUCATOR EXPENSES

Educator expenses of \$300 or less? YES NO

CHILD CARE CREDIT

Work Related Child and Dependent Care Expenses. List Persons or Organizations Providing Care:

<u>Name</u>	<u>Address</u>	<u>(SSN or EIN)</u>	<u>Amount Paid</u>
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____

EDUCATION TAX CREDITS AND DEDUCTIONS

American Opportunity Tax Credit, Lifetime Learning Credit and Tuition and Fees deduction

<u>Name</u>	<u>Tuition</u>	<u>Books and Materials</u>	<u>Check one of the following:</u>	
			<u>First 4 Years</u>	<u>4+ Years</u>
_____	\$ _____	\$ _____	_____	_____
_____	\$ _____	\$ _____	_____	_____

STUDENT LOAN INTEREST

Please attach Form 1098-E. Limited to interest required to be paid by taxpayer. \$ _____

Important! If you are claiming Head of Household, Earned Income Credit, or Education Credits please see the following chart and sign off that you qualify and bring any supporting			
Marriage Test	If You Are:		Then send photocopies of the following documents.
	Single		Go to the Qualifying Person Test and Cost of Keeping up a Home Test
	Divorced or legally separated		Entire divorce decree, separate maintenance decree, or separation agreement.
	Married, but your spouse did not live with you during the last 6 months of 2022		Documents verifying your spouse did not live with you during the last 6 months of the year, such as lease agreement, utility bills, letter from clergy member, or letter from social services.
Qualifying Person Test	If the Person Is:	And	Then send photocopies of the following documents.
If your relationship with the child is not in this listing, please see Publication 501, Exemptions, Standard Deduction, and Filing Information for more information.	Your child. Your brother or sister, stepbrother or stepsister, or any of their descendants (ex-grandchild, niece, or nephew) Your eligible foster child.	You can claim a dependency exemption for the child. The child lived in your home for more than 1/2 of 2022. Note: A married child must be your dependent.	Birth certificates, social security card, or court document that verify your relationship to the child. To show both you and your child lived together for more than 1/2 of 2022, send:• School, medical, daycare, or social service records• A letter on the official letterhead from a school, medical provider, social service agency, or place of worship that shows names, common address and dates. (If you send a letter from a relative who provides your daycare, you MUST send at least one additional letter.) Send as many documents as necessary to show that the child lived with you for more than half of the year.
Cost of Keeping up a Home Test	If:	And	Then send photocopies of the following documents.
	You pass both the marriage test and the qualifying person test	You paid more than 1/2 the cost of keeping up your home for 2022.	Rent receipts, utility bills, grocery receipts, property tax bills, mortgage interest statement, upkeep and repair bills, property insurance statement, and other household bills.

If you passed the qualifying person test and the cost of keeping up a home test please sign and date. We will need the documentation listed above to keep in your file.

_____	_____	_____
Name	Signature	Date