

2022 TAX YEAR

Important tax season information! Please Read!

Please send your tax documents once you have everything, rather than piecemeal. This helps with our turnaround times and efficiency!

When you have all tax documents gathered, please email them to carson@sandsco.net with subject line "Ready to file 2022".

Our turnaround time is usually 2 weeks or less, but can be longer at the peak of tax season.

Please send us your documents as soon as possible so we can ensure a timely filing. Please have 1120S & 1065 documents in to us before March 1st, and 1120 and 1040 documents in before April 1st. **THE SOONER THE BETTER!**

We will send you a draft of your tax return to review when it is ready to your EMAIL. We do not print tax returns automatically, but will provide a paper copy if you'd like one. Just let us know!

We will send form 8879 and instructions with your tax return. That form allows us to e-file your tax return. That must be signed and sent back to us before we can file.

All Sands CPA invoices must be paid prior to us filing your tax return. We send all invoices via email through Square.

You can track your refund on the IRS website:
www.irs.gov

2022 TAX PREP CHECKLIST

For Individuals

- All W-2(s) for all filers
- All 1099(s) from other income/benefits for all filers. Bank interest, Social Security income, 1099-NEC, etc.
- K-1(s) for all filers
- Health Savings account (HSA) contributions
- Mortgage interest statement(s) + real estate taxes paid
- Childcare statements showing amount paid & care facility EIN
- Charitable contribution statements
- Retirement contributions & withdrawals
- Closing statement from home sale or home purchase
- Educator expenses (for teachers)
- Documentation for any energy efficient home upgrades such as solar panels
- Vehicle purchase documentation
- Total medical expenses *only if excessive*



Let us know if you:

- Changed address or moved
- Had a new baby
- Married/divorced
- Changed jobs



- When you have all tax documents gathered, please email them to carson@sandsco.net with subject line "Ready to file 2022".
- You can also drop your tax documents by our office.
- We are located at 2806 S Murvil Street, Decatur, TX.
- If you are mailing your tax documents please use our mailing address:
1816 S FM 51, Suite 400-106, Decatur, TX 76234

2022 TAX PREP CHECKLIST

Business Owners - Page 1 of 2

- Total business income (Total revenue/gross receipts)
- Home office expenses (We need the total office square footage and the total home square footage)
- Total estimated tax payments made during the year
- Documentation for large purchased made over \$2,500. (We need date of purchase and total cost).
- Number of business miles driven on personal vehicle during the year
- List of capital assets and equipment purchased/sold
- Expenses totaled by category*** See Page 2 for categories.



1. Make sure your books are up-to-date and reconciled
2. Make sure to review your Profit and Loss statement and verify it looks correct to you!
3. We do not need receipts for all of your expenses. We only need a total for each category. You should save your receipts to show the IRS if you are ever audited.
4. Partnership and S-corp tax returns are due MARCH 15th. Please email us at carson@sandsco.net and let us know as soon as your books are ready for us to work on your tax return. The sooner the better!

2022 TAX PREP CHECKLIST

Business Owners - Page 2

Expense totals
we need:

- Marketing and advertising
- Office utilities (phone, internet, electric, etc.)
- Office supplies
- Cost of goods sold
- Contract labor paid
- Rent paid
- Business insurance
- Business meals with clients
- Employee meals
- Business travel expenses
- Dues and subscriptions
- Legal and professional fees
- Banking fees
- Totals for all other expenses. We will deduct the items the IRS allows and omit anything that is not deductible.



You can provide this information via QuickBooks reports, excel spreadsheet, Google document, or just a list on a piece of paper.

If you have QB, you can grant us accountant's access with our email, carson@sandsco.net.

2022 TAX PREP CHECKLIST

Rental properties

Rental expenses we
need totals for:

- Repairs and maintenance
- Utilities
- Travel expenses related to your real estate activities
- Closing costs
- Mileage driven on personal vehicle to and from rental properties
- Property management fees
- Property insurance for each rental property
- Mortgage interest for each rental property
- Accounting fees
- Legal and professional fees
- Licensing and registration fees
- Occupancy taxes
- HOA dues
- Theft or casualty losses



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2022 TAX PREP CHECKLIST

New Clients

Make sure you send us these items:

- SSNs for all filers and dependents
- DOBs for all filers and dependents
- Copy of last year's tax return



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