

My *2022 Tax Folder

Collapsed and Expanded Folders mid-January 2023

< > *2022 Tax Folder	
Name	
>	Tax plan tax year 2022; Spend 2023
>	Tax Return Steps, Checklist
>	Income Related Docs and Summary (mostly 1099s)
>	Expense (Sched A) Related Docs and Summaries
>	x Est Income Taxes Paid & W/H (F,S,L)
>	x IRA Year-End Values (Forms 5498)
>	x QCD donations and receipts
>	x529 Plan Contributions and Yr End Values
>	xIRS Identity PINs (for e-file)

< > *2022 Tax Folder	
Name	
∨	Tax plan tax year 2022; Spend 2023
	1128 22 Final Tax Plan for 2022 Spend for 2023.xlsx
∨	Ordinary Tax and Medicare Tables
	Medicare Tripwires Table issued Sept '22.xlsx
	2022 Ordinary Tax Table.xlsx
∨	Tax Return Steps, Checklist
	List of Items to Complete.xlsx
	Schedule of tasks in ToDo App.xlsx
	List of items to enclose for accountant.xlsx
∨	Income Related Docs and Summary (mostly 1099s)
∨	1099-B, DIV, INT (Fidelity & Quicken)
	Interest Income PNC checking
>	1099-G (S,L tax refunds, if any)
∨	1099-R (Fidelity, Boeing)
	1099-R Boeing from Fidelity site.pdf
∨	1099-SSA (2)
	SSA-1099 PHC.pdf
	SSA-1099 TNC.pdf
>	1099-xMISC
>	K-1
∨	xSchedule D summary in Accountant's format
	Sched D detail 2022 (pending).xlsx
∨	Expense (Sched A) Related Docs and Summaries
∨	1 Medical and Dental Expenses
	Med Insur and Expenses.xlsx
	Medical Insurance Premiums TNC, PHC.pdf
	Other Med Expenses PHC, TNC 2022.pdf
∨	2 State & Local Taxes
∨	Income Taxes
	Summy F,S,L Taxes for FY 2022.xlsx
	EFTPS Record of Taxes Paid
	MyPath Record of Taxes Paid
	Quicken Est Taxes Paid.pdf
∨	RE Taxes
	2022 City RE Taxes Bill.pdf
	2022 Cnty RE Taxes Bill.pdf
	2022 Receipt City RE taxes.pdf
	Quicken RE Taxes paid in 2022
∨	3 Mortgage Interest
	1098 Flagstar.pdf
>	4 Gifts to Charities, other than QCD
∨	x Est Income Taxes Paid & W/H (F,S,L)
	0110 Est & WH taxes 2022.xlsx
∨	x IRA Year-End Values (Forms 5498)
	Summy of 5498s 12-31-22.xlsx
∨	x QCD donations and receipts
	Statement of QCD Donations for 2022.docx
∨	x529 Plan Contributions and Yr End Values
	1222 22 Contributions to 529 Plans.docx
∨	xIRS Identity PINs (for e-file)
	x PHC IRS Identity PIN Screenshot 2023-01-10 at 2.07.04 PM
	x TNC IRS Identity PIN Screenshot 2023-01-10 at 8.59.14 AM