

2022 PERSONAL DATA

NOTE: ALL CLIENTS ARE REQUIRED TO COMPLETE ALL FIELDS AS APPLICABLE

| | NAME | SSN | DATE OF BIRTH | DATE OF DEATH |
|----------|------|-----|---------------|---------------|
| TAXPAYER | | | | |
| SPOUSE | | | | |

| |
|-------------------------------------|
| STREET ADDRESS, CITY, STATE AND ZIP |
| |

| | OCCUPATION | DAYTIME PHONE | EVENING PHONE | CELL PHONE | E-MAIL |
|----------|------------|---------------|---------------|------------|--------|
| TAXPAYER | | | | | |
| SPOUSE | | | | | |

| --- TAXPAYER IDENTIFICATION - PLEASE COMPLETE AND PROVIDE COPY OF DRIVERS LICENSE OR STATE ISSUED PHOTO IDs --- | | | | | |
|---|---|-----------------------|---------------|------------|-----------------|
| | INDICATE "D" (DRIVERS LICENSE) OR "S" (STATE ISSUED ID) | IDENTIFICATION NUMBER | NAME OF STATE | ISSUE DATE | EXPIRATION DATE |
| TAXPAYER | | | | | |
| SPOUSE | | | | | |

| IDENTIFY YOUR 2022 TAXPAYER FILING STATUS | |
|---|---|
| CHECK BOX | FILING STATUS |
| | SINGLE |
| | MARRIED FILING JOINTLY |
| | MARRIED FILING SEPARATELY (Be sure to provide Spouse NAME, SSN, DATE OF BIRTH & DATE OF DEATH above) |
| | HEAD OF HOUSEHOLD |
| | QUALIFYING WIDOW(ER) (Be sure to provide Spouse NAME, SSN, DATE OF BIRTH & DATE OF DEATH above) |

| TAXPAYER | | SPOUSE | | GENERAL QUESTIONS (CHECK "YES" OR "NO") |
|----------|----|--------|----|---|
| YES | NO | YES | NO | |
| | | | | Are you BLIND? |
| | | | | Are you DISABLED? |
| | | | | Are you a DEPENDENT of ANOTHER? |
| | | | | Are you a FULL TIME STUDENT? |
| | | | | DESIGNATE \$3 to go to the PRESIDENTIAL ELECTION CAMPAIGN FUND? |

| TOTAL PROPERTY TAXES PAID ON PRINCIPAL RESIDENCE | |
|--|--------|
| | |
| BLOCK # | SUFFIX |
| | |
| LOT # | SUFFIX |
| | |
| QUALIFIER | |
| | |

| TOTAL RENT PAID ON PRINCIPAL RESIDENCE BY TAXPAYER AND SPOUSE |
|---|
| |

REQUIRED IRS DIGITAL ASSETS QUESTION (CHECK "YES" OR "NO" BELOW)

DEFINITION: DIGITAL ASSETS ARE ANY DIGITAL REPRESENTATIONS OF VALUE THAT ARE RECORDED ON A CRYPTOGRAPHICALLY SECURED DISTRIBUTED LEDGER OR ANY SIMILAR TECHNOLOGY. FOR EXAMPLE, DIGITAL ASSETS INCLUDE NON-FUNGIBLE TOKENS (NFTS) AND VIRTUAL CURRENCIES, SUCH AS CRYPTOCURRENCIES AND STABLECOINS. IF A PARTICULAR ASSET HAS THE CHARACTERISTICS OF A DIGITAL ASSET, IT WILL BE TREATED AS A DIGITAL ASSET FOR FEDERAL INCOME TAX PURPOSES. YOU HAVE A FINANCIAL INTEREST IN A DIGITAL ASSET IF YOU ARE THE OWNER OF RECORD OF A DIGITAL ASSET, OR HAVE AN OWNERSHIP STAKE IN AN ACCOUNT THAT HOLDS ONE OR MORE DIGITAL ASSETS, INCLUDING THE RIGHTS AND OBLIGATIONS TO ACQUIRE A FINANCIAL INTEREST, OR YOU OWN A WALLET THAT HOLDS DIGITAL ASSETS.

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)?

| | | |
|------------------|--|--|
| YES -> | | <p>CHECK "YES" IF AT ANY TIME DURING 2022 YOU HAD ONE OR MORE OF THE FOLLOWING ACTIVITIES:</p> <ul style="list-style-type: none"> • Received Digital Assets as Payment for Property or Services Provided • Received Digital Assets as a Result of a Reward or Award • Received New Digital Assets as a Result of Mining, Staking and Similar Activities • Received Digital Assets as a Result of a Hard Fork • Disposed of Digital Assets in Exchange for Property or Services • Disposed of a Digital Asset in Exchange or Trade for Another Digital Asset • Sold a Digital Asset • Transferred Digital Assets for Free (Without Receiving any Consideration) as a Bona Fide Gift • Otherwise Disposed of any Other Financial Interest in a Digital Asset |
| NO -> | | <p>THE FOLLOWING ACTIONS OR TRANSACTIONS IN 2022, ALONE, GENERALLY DON'T REQUIRE YOU TO CHECK "YES":</p> <ul style="list-style-type: none"> • Holding a Digital Asset in a Wallet or Account • Transferring a Digital Asset from One Wallet or Account You Own or Control to Another Wallet or Account that you Own or Control • Purchasing Digital Assets Using U.S. or Other Real Currency, Including Through the Use of Electronic Platforms Such As Paypay & Venmo |

REQUIRED IRS FOREIGN ACCOUNT QUESTIONS (TAXPAYER CHECK "YES" OR "NO" BELOW)

| | YES | NO |
|--|-----|----|
| <p>QUESTION # 1 DOES THE TAXPAYER HAVE ANY INTEREST IN, OR AUTHORITY OVER, ANY FOREIGN ACCOUNT OR FOREIGN TRUST? IF "YES", PROCEED TO QUESTION #2</p> | | |
| <p>QUESTION # 2 AT ANY TIME DURING 2022, DID THE TAXPAYER HAVE A FINANCIAL INTEREST IN OR SIGNATURE AUTHORITY OVER A FINANCIAL ACCOUNT (SUCH AS A BANK, SECURITIES AND/OR BROKERAGE ACCOUNT) LOCATED IN A FOREIGN COUNTRY? IF "YES", PROCEED TO QUESTION #3</p> | | |
| <p>QUESTION # 3 IS THE TAXPAYER REQUIRED TO FILE FINCEN FORM 114, REPORT OF FOREIGN BANK & FINANCIAL ACCOUNTS (FBAR), TO REPORT THAT FINANCIAL INTEREST OR SIGNATURE AUTHORITY? IF "YES" PROVIDE THE FOREIGN COUNTRY NAMES & PROCEED TO QUESTION #4</p> | | |
| <p>QUESTION # 4 DURING 2022, DID THE TAXPAYER RECEIVE A DISTRIBUTION FROM OR WAS THE GRANTOR OF, OR TRANSFEROR TO, A FOREIGN TRUST?</p> | | |
| <p>LIST FOREIGN COUNTRY NAMES -></p> | | |

IDENTIFY ALL ESTIMATED TAX PAYMENTS APPLIED TO 2022

| | FEDERAL | RESIDENT STATE | RESIDENT CITY |
|-------------------------------|--------------------|--------------------|--------------------|
| | DATE PAID / AMOUNT | DATE PAID / AMOUNT | DATE PAID / AMOUNT |
| OVERPAYMENT APPLIED FROM 2021 | | | |
| 1ST QTR | | | |
| 2ND QTR | | | |
| 3RD QTR | | | |
| 4TH QTR | | | |
| ADDITIONAL PAYMENTS | | | |

NEW YORK TAXPAYERS ONLY - REQUIRED ADDITIONAL INFORMATION (PRINT CLEARLY)

1.) PROVIDE SCHOOL DISTRICT NAME:

| |
|--|
| |
|--|

2.) ENTER DOCUMENT NUMBER FROM YOUR DRIVERS LICENSE. IT IS A 8 OR 10 DIGIT COMBINATION OF NUMBERS & LETTERS ON YOUR LICENSE, NON DRIVER-ID OR PERMIT. IT IS ON THE FRONT LOWER RIGHT CORNER OF CARD IF ISSUED BEFORE 1/28/14 OR ON BACK OF CARD ISSUED AFTER 1/28/14:

| | |
|----------|--|
| TAXPAYER | |
| SPOUSE | |

3.) HAVE YOU OR YOUR SPOUSE (OR AN ENTITY OF WHICH YOU ARE AN OWNER) BEEN CONVICTED OF AN OFFENSE, DEFINED IN NY STATE PENAL CODE LAW ARTICLE 200 OR 496, OR SECTION 195.20? (CHECK YES OR NO)

| | |
|--------|--|
| YES -> | |
|--------|--|

| | |
|-------|--|
| NO -> | |
|-------|--|

NEW JERSEY TAXPAYERS ONLY - REQUIRED ADDITIONAL INFORMATION (PRINT CLEARLY)

1.) FULL YEAR & PART-YEAR RESIDENTS ONLY - DID YOU (OR SPOUSE) BUY TAXABLE ITEMS WITHOUT PAYING NJ SALES TAX? THIS INCLUDES ORDERS OVER THE INTERNET, BY MAIL, OR BY PHONE ON WHICH YOU DID NOT PAY NJ SALES TAX. THIS ALSO INCLUDES OUT-OF-STATE PURCHASES ON WHICH YOU PAID TAX AT A RATE LESS THAN 6.625%. (CHECK YES OR NO)

| | | | |
|--------|--|--|--|
| NO -> | YOU CERTIFY THAT NO USE TAX IS DUE | | STOP HERE |
| YES -> | AND YOU <u>DID NOT</u> KEEP ACCURATE RECORDS | | USE TAX WILL BE CALCULATED BASED ON INCOME |
| YES -> | AND YOU <u>DID</u> KEEP ACCURATE RECORDS | | PROCEED TO STEP 2 |

STEP 2

| | | | |
|--|--|--|--|
| ENTER TOTAL AMOUNT OF ALL PURCHASES (ITEMS UNDER \$1,000 EACH ONLY) -> | | ENTER SALES TAX PAID TO OTHER STATES ON THESE ITEMS -> | |
| ENTER TOTAL AMOUNT OF ALL PURCHASES (ITEMS \$1,000 EACH OR MORE ONLY) -> | | ENTER SALES TAX PAID TO OTHER STATES ON THESE ITEMS -> | |

2.) ALL NJ TAXPAYERS - ARE YOU A MILITARY VETERAN HONORABLY DISCHARGED OR RELEASED BEFORE THE LAST DAY OF THE TAX YEAR?

| | |
|--------|----------|
| | TAXPAYER |
| YES -> | |
| NO -> | |

| | |
|--------|--------|
| | SPOUSE |
| YES -> | |
| NO -> | |

IF YES, **AND ONLY IF NOT PREVIOUSLY PROVIDED**, COMPLETE THE ATTACHED VETERANS INC TAX EXEMPTION SUBMISSION FORM AND PROVIDE A COPY OF YOUR OFFICIAL DISCHARGE DOCUMENT (ONE OF THE FOLLOWING ACCEPTABLE OFFICIAL DOCUMENTATION):

| | |
|---------------------------|---|
| DD 214 | Certificate of Release or Discharge from Active Duty |
| WD AGO 53 | Enlisted Record and Report of Separation Honorable Discharge |
| WD AGO 53-98 | Military Record and Report of Separation Certificate of Service |
| WD AGO 55 | Honorable Discharge from the Army of the United States |
| NA Form 13038 | Certificate of Military Service |
| NAVCG 553 | Notice of Separation from U.S. Coast Guard |
| NAVMC 78PD | U.S. Marine Corps Report of Separation |
| NAVPER 553 | Certificate of Separation/Discharge from U.S. Navy |
| County Veteran ID Card | Veteran identification card issued by any of the New Jersey |
| Federal Veteran ID Card | Veteran identification card issued under the Veterans Identification Card |
| 20 Year Retirement Letter | |



Veterans Income Tax Exemption Submission Form

You Must Send a Copy of Your [Official Discharge Document](#) With This Document.

Personal Information

Name: _____
Last *First*

Social Security Number: _____ Date of Birth _____

Spouse Name: _____
Last *First*

Spouse Social Security Number: _____ Date of Birth _____

Address: _____
Street Address *Apartment/Unit #*

City *State* *ZIP Code*

Home Phone: () _____ Daytime Phone: () _____

E-mail Address: _____

Signature

Signature: _____ Date: _____

Spouse Signature: _____ Date: _____

Where to Send the Completed Form

- **Online**, use our secure document [upload](#) feature.
Enter the notice code **VET** and select **PO Box 440**; *or*
- **Mail**, with a copy of your [discharge document](#) to:
The New Jersey Division of Taxation
Veteran Exemption
PO Box 440
Trenton, NJ 08646-0440; *or*
- **Fax** with a copy of your [discharge document](#) to: **609-633-8427**.