Tax Appointment Checklist

Personal information

- ✓ Last years income tax if you are a new client
- ✓ Name, address, Social Security number and Date of Birth for yourself, spouse and dependents
- ✓ Dependent Provider, Name, Address, Tax ID and S.S.N.
- ✓ Banking information if Direct Deposit Required

Income Data Required

- ✓ Wages and/or Unemployment
- ✓ Interest and/or Dividend Income
- ✓ State/Local income tax refunded
- ✓ Social Assistance Income
- ✓ Pension/Annuity/Stock or Bond Sales
- ✓ Contract/Partnership/Trust/Estate Income
- ✓ Gambling/Lottery Winnings and Losses/Prizes/Bonus
- ✓ Alimony Income
- ✓ Rental Income
- ✓ Self Employment/Tips
- ✓ Foreign Income

Expense Data Required

- ✓ Dependent Care Costs
- ✓ Education/Tuition Costs/Materials Purchased
- ✓ Medical/Dental
- ✓ Mortgage/Home Equity Loan Interest/Mortgage Insurance
- ✓ Employment Related Expenses
- ✓ Gambling/Lottery Expenses
- ✓ Tax Return Preparation Expenses
- ✓ Investment Expenses
- ✓ Real Estate Taxes
- ✓ Estimated Tax Payments to Federal and State Government and Dates Paid
- ✓ Home Property Taxes
- ✓ Charitable Contributions Cash/Non-Cash
- ✓ Purchase qualifying for Residential Energy Credit
- ✓ IRA Contributions/Retirement Contributions
- ✓ Home Purchase/Moving Expenses