

TAX APPOINTMENT CHECKLIST

○ Personal information:

- Last year's income tax (if you are a new client)
- Name, address, Social Security number and Date of Birth for yourself, spouse and dependents
- Telephone
- Banking information if Direct Deposit Required
- Copies of License and Social Security Cards

○ Income:

- Wages and/or Unemployment
- Self-Employment Income (1099-MISC)
- Interest and/or Dividend Income
- Seller Financed Mortgage Interest
- Installment Sale Income
- Stock Sales (1099-B)
- State/Local income tax refunded
- Social Security Income
- Social Assistance Income
- Pension/Annuity/IRA Distributions
- Contract/SCorporation/Partnership/Trust/Estate Income (K1's)
- Gambling/Lottery Winnings and Losses/Prizes/Bonus
- Alimony Income
- Rental Income/Royalty Income
- Tip Income (not reported to employer)
- Foreign Income

○ Expenses:

- Dependent Care Costs (Dependent Care Provider, Name, Address, Tax ID or SSN)
- Household Employment
- Student Loan Interest/Education/Tuition Costs/Materials Purchased
- Alimony Paid
- Medical, Dental & Health Insurance (Itemized)
- Mortgage/Home Equity Loan Interest/Mortgage Insurance
- Real Estate Taxes (Copy of Final Bill)
- Personal Property Taxes (City/Town Portion only of Vehicle Registration)
- Sales Taxes
- Employment Related Expenses (Union Dues, Home Office)
- Tax Return Preparation Expenses
- Gambling/Lottery Expenses
- Investment Expenses / Financial Planning Expenses
- Self-Employment Expenses (Itemized)
- Estimated Tax Payments to Federal & State Government and Dates Paid
- Charitable Contributions Cash/Non-Cash
- Purchase qualifying for Residential Energy Credit
- IRA Contributions/Retirement Contributions
- HSA Contributions/Withdrawals
- Home Purchase/Moving Expenses
- Teacher Expenses
- Rental Expenses (Itemized)
- Adoption Expenses