Tax Appointment Checklist

- **Personal information** -
  - ☐ Last year's income tax return 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 preferred

- **Income Data Required** -
  - ☐ Wages and/or Unemployment and W2's
  - ☐ 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 with associated 1098-T's
  - ☐ Medical/Dental with associated 1095's
  - ☐ 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 with Dates Paid for each payment
- ☐ Home Property Taxes
- ☐ Charitable Contributions Cash/Non-Cash
- ☐ Purchase qualifying for Residential Energy Credit
- ☐ IRA Contributions/Retirement Contributions
- ☐ Home Purchase/Moving Expenses

Please note: this is not intended to be a comprehensive list, but it should serve as an excellent starting place for your tax appointment. The information listed here is a minimum of what we need to prepare your return. Your situation may vary and we may request additional information as we gain a better understanding of your tax needs during our meeting.