Tax Appointment Checklist

DOCUMENTS TO PROVIDE

- **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
  - Driver's license for both spouses
  - Phone numbers and email addresses

- **Income Data Required** -
  - Wages and/or Unemployment Form W-2
  - Interest and/or Dividend Income - Form 1099-Int 1099-Div
  - State/Local income tax refunded
  - Social Assistance Income
  - Pension/Annuity/Stock or Bond Sales Form 1099-R
  - Contract/Partnership/Trust/Estate Income Form K-1
  - Gambling/Lottery Winnings and Losses/Prizes/Bonus
  - Alimony Income
  - Rental Income
  - Self Employment/Tips
  - Foreign Income
  - Social Security Benefits received Form SSA1099
  - If business: all income support of the business for the year, any 1099 Forms

- **Expense Data Required and other documents**
  - 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
  - Interest and points paid to bank on primary residential – Form 1098
  - Health Insurance coverage – Form 1095-B or Form 1095-A
  - If business: all expense support related to this business for the year