Tax Appointment Checklist

Personal information

- [ ] Last year’s income tax (if you are a new client)
- [ ] Your name, address, social security card(s)
- [ ] The 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
- [ ] Pension/annuity/stock or bond sales
- [ ] Contract/partnership/trust/estate income
- [ ] Gambling/lottery winnings and losses/prizes/bonuses
- [ ] 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
- [ ] Gambling/lottery 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

Business Clients

- [ ] SS4 form or EIN#