



THERESE BURKHARDT
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Appointment Checklist

Note: Not having all your required documents before your appointment could cause a delay in filing your tax return.

- Names, birth dates, social security #'s for yourself, spouse, & dependents if you are not in our system.
- Third stimulus amount \$ _____
- Child tax credit advance payment amount \$ _____
- Earned income (W-2's and/or 1099-NEC and/or 1099-K)
- Pension/Annuity/IRA income (1099-R)
- Social Security income (SSA-1099)
- Interest income (1099-INT)
- Dividend Income (1099-DIV)
- Proceeds from broker & barter exchange transactions (1099-B)
- Unemployment income/state refund from prior year/taxable grants (1099-G)
- Gambling/Lottery/prize winnings (W-2-G)
- Income from Corporation, Partnership, Estate, Trust, etc. (K-1)
- Records of any other income
- Alimony paid/received
- Proof of medical insurance (1095-B, 1095-C) (1095-A, covered CA)
- Mortgage interest statement (1098)
- Mortgage assistance payments (1098-MA)
- Taxes paid on mortgage
- Charitable contribution receipts (cash & non-cash)
- Education expenses (1098-T)
- Student loan interest paid (1098-E)
- Cancellation of debt (1099-C)
- Child care paid (care providers name, address, tax ID #, and phone #)
- Bank account information (name of bank, routing #, and account #)
- Escrow final settlement statement (if you bought, sold, or refinanced your home during the tax year)
- Car license fees (if you itemize)
- Medical bills (if you itemize) (must be more than 7.5% above your adjusted gross income)
- Union Dues (if you itemize) STATE ONLY
- Bill of sale (if you bought a boat, automobile, recreational vehicle, or other special item)
- Employee business expenses (summary of items you bought for work) STATE ONLY
- Office in home expenses (Please see our office in home worksheet)
- Rental income and expenses (Please see our rental property worksheet)
- Business income and expenses (Please see our self-employed worksheet or **specific business** worksheet)
- Estimated taxes paid during the tax year including January payment (4th quarter)
- Retirement contributions (401 (k), 403 (b), 457 (g), SEP, Simple, traditional, ROTH IRA, etc.)