

Tax Appointment Checklist

o Personal information

- The last two years of income tax returns if you are new to my firm.
- Name and/or name changes, address and /or address changes, social security number and date of birth for yourself, spouse, and dependents.
- Dependent care provider information such as, name, address, federal tax number or S.S.N. This required for taxpayers with children under the age of 13 and in after school care or daycare.
- Banking information if direct deposit or direct debit is required.
- Proof of health insurance for 2023 if your insurance was issue from the HealthCare Marketplace. You will need to bring Form 1095A
- Your IP PIN that was sent to you in December by the Internal Revenue Service if you have been a Victim of identity theft in the past or if you participated in the program at any point in the past.
- If you are a homeowner, I will need the 1098 mortgage interest statement and your property tax bill. If you cannot find your mortgage information you can call the company that hold's your mortgage and ask for the information over the phone. This will be sufficient. You will ask them for all information on

the 1098 Mortgage Interest Statement. Also, any information on a second mortgage such as a HELOC. If you cannot find your tax bill, you can obtain it by going to your county's property tax website and print the bill there. I will need it to determine the ad valorem taxes and non-ad valorem assessments.

o All sources of income data Required

- Wages and/or Unemployment = W-2s or 1099G
- Interest and/or Dividend Income = 1099 Int /1099 Div.
- Stock or Bond Sales = 1099B
- State/Local Income Tax Refund = 1099G
- Social Security or Disability Income
- Pension/Annuity Withdrawals, RMDs = 1099R
- 1120S/Partnership/Trust/Estate Income = K-1
- Gambling/Lottery Winnings/Prizes/Bonus = W-2G or 1099M
- Alimony Income = Only for divorce settlements prior to

12-31-2018

- Rental Income
- Self-Employment Income
- Tips
- Foreign Source Income
- Inheritance
- All other income of any kind!

o Expense Data Required -

- Dependent Care Costs
- Education/Tuition Costs/Materials Purchased
- Medical/Dental

- Mortgage/Home Equity Loan Interest/Mortgage Insurance
- Gambling/Lottery Expenses
- Real Estate Taxes
- Estimated Tax Payments to Federal and State Government
Agencies and Dates Paid
- Home Property Taxes
- Charitable Contributions Cash/Non-Cash
- Purchase information for qualifying Solar Residential Energy Credit and/or Electric Vehicle Credit
- IRA Contributions/Retirement Contributions
- New Home Purchase = HUD 1 closing statement
- Moving Expenses only if you are Military or Government
- A paper copy of your business expenses and /or mileage log
if you are self employed