



Tax Appointment Checklist

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

Income Data Required -

- Wages and/or Unemployment
- 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

Simple Tax and Loans
Dallas, Texas 75202

C: 682.375.6415 | F: 347.823.2799 | info@simpletaxandloans.com



Expense Data Required -

- 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

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