Tax Appointment Checklist

- **Personal information** -
  - Last years income tax if you are a new client with all W-2's, 1099's, etc.
  - Name, address, Social Security number and Date of Birth for yourself, spouse and dependents
  - **Copy of drivers license for both taxpayer and spouse**
  - Dependent Care Provider, Name, Address, Tax ID and S.S.N.
  - Banking information if Direct Deposit Required

- **Income Data Required** -
  - Wages and/or Unemployment forms **W-2** and/or **1099-G**
  - Interest and/or Dividend Income **(with any Form 1099-INT and 1099-DIV)**
  - State/Local income tax refunded last year or paid with return
  - Social Assistance Income
  - Pension/Annuity/Stock or Bond Sales **(with any Form 1099-B with <u>cost basis data</u>)**
  - Contract/Partnership/Trust/Estate Income **(Form K-1)**
  - Gambling/Lottery Winnings and Losses/Prizes/Bonus
  - Alimony Income
  - Rental Income/expenses and prior depreciation table
  - 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
- 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-only if military)

For real estate sales:

1. The HUD-1 Closing or Settlement Statement from the initial purchase.
2. The HU109D-1 Closing or Settlement Statement from the sale.
3. Prior rental or business use depreciation table, if any.