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 Care Provider, Name, Address, Tax ID, or SSN.
  - Banking information if Direct Deposit of refund required

- **Income Data Required** -
  - Wages and/or Unemployment Income (Forms W-2 and W-2G)
  - Interest and/or Dividend Income
  - State/Local income tax refunded (prior year)
  - Social Assistance Income
  - Pension/Annuity Income (Forms 1099R)
  - Stock or Bond Sales (Forms 1099B)
  - Real Estate Sales (Forms 1099-S)
  - Social Security Retirement Benefits (Forms SS-1099)
  - Contract/Partnership/Trust/Estate Income (Schedules K-1)
  - Gambling/Lottery Winnings and Losses/Prizes/Bonus
  - Alimony Income
  - Rental Income
  - Self Employment/Tips Income
  - Foreign Income

- **Expense Data Required** -
  - Dependent Care Costs
  - Education/Tuition Costs (Forms 1098T)
  - Business expenses
  - Unreimbursed Medical/Dental expenses
  - Health insurance premiums paid
  - Mortgage/Home Equity Loan Interest/Mortgage Insurance
  - Gambling/Lottery Expenses
  - Tax Return Preparation fees paid
  - Investment Expenses
  - Real Estate taxes paid
  - Estimated Tax Payments made to Federal and State Government, and dates paid
  - Charitable Contributions in Cash
  - Non-Cash Charitable Contributions
  - Purchases qualifying for Residential Energy Credit
  - IRA Contributions/Retirement Contributions
  - Home Purchase or Mortgage Refinance (HUD-1 Statement)