Tax Appointment Checklist

- **Personal Information** For New Clients –
    - Last year's income tax return
    - Name, address, social security number, and date of birth for yourself, spouse, and dependents
    - Dependent childcare provider, name, address, and tax ID or Social Security Number
    - Banking information for direct deposit

- **Income Information** –
    - Wages and/or Unemployment – W2/1099-G
    - Interest and/or Dividend Income – 1099-INT/1099-DIV
    - State/Local Income Tax refunded – 1099-G
    - Social Assistance Income – W2
    - Pension/Annuity/Stock or Bond Sales – 1099-R or 1099-B
    - Contract/Partnership/Trust/Estate Income -1099-MISC
    - Gambling/Lottery Winnings and Losses/Prizes/Bonus – 1099-(W2G)
    - Alimony Income
    - Rental Income – 1099-MISC
    - Self Employment Tips – 1099-MISC
    - Foreign Income

- **Expense Data Required** –
    - Dependent Care Costs
    - Education/Tuition Costs/Materials Purchased- 1098-T
    - Medical/Dental
    - Mortgage/Home Equity Loan Interest/Mortgage Insurance – 1098
    - 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