

## **Tax Appointment Checklist**

### **o 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

### **o 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

- o **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