



## **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

### **Expense Data Required -**

- Dependent Care Costs
- Education/Tuition Costs/Materials Purchased
- Medical/Dental

- Mortgage/Home Equity Loan Interest/Mortgage Insurance
- Gambling/Lottery 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