Income Tax Appointment Checklist

Please Note: The list below is based on most individual tax return and may not apply to your tax filing.

- **Personal information** -
  - A copy of the last year income tax return you filed. (if you are a new client)
  - Name, address, Social Security number and Date of Birth for yourself, spouse and all dependents
  - Dependent Day Care Provider, Name, Address, Tax ID and or S.S. Number.
  - Blank Voided Check if Direct Deposit Required

- **Income Data Required** -
  - W2 Forms, 1099 Forms, Wages and/or Unemployment
  - Interest and/or Dividend Income, 1099 Forms
  - State/Local income tax refunded, 1099 Forms
  - Social Security Income, 1099 Form
  - Pension/Annuity, 1099 Form
  - Stock or Bond Sales, 1099 Form
  - Buy and Sell Property
  - Refinance
  - Contract/Partnership/Trust/Estate Income, K-1 Forms
  - Gambling/Lottery Winnings and Losses/Prizes/Bonus, etc. 1099 Forms
  - Alimony Income, Ex Spouse’s Name & Social Security Number
  - Rental Income and Expenses
  - Self Employment, 1099 Form
  - Tips, 1099 Form
  - Foreign Income

- **Expense Data Required** -
  - Dependent Care Costs
  - Child Care Tax Credit, Child Premium Tax Credit
  - Educational Institution, Name, Address & Tax ID Number

- Education/Tuition Costs/Materials Purchased
- Medical/Dental
- Mortgage/Home Equity Loan Interest/Mortgage Insurance, 1098 Form
- Employment Related Expenses, Work Related Driving
- Gambling/Lottery Expenses, only if gambling/lottery income
- Tax Return Preparation Expenses
- Investment Expenses
- Rental Real Estate Taxes
- Estimated Tax Payments to Federal and State Government and Dates Paid
- Primary Home Real Estate Property Taxes
- Charitable Contributions Cash/Non-Cash – Names of Non-Profit Organizations
- Charitable Contributions if over $500, Value of Donations, Names, Address & Tax ID Number.
- Purchase qualifying for Residential Energy Credit
- IRA Contributions/Retirement Contributions
- Home Purchase/Moving Expenses – move must be 35 miles from former job.

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