Tax Appointment Checklist

Personal information

- Last 2 to 3 years income tax if you are a new client
- Name, address, and Date of Birth for yourself, spouse and dependents
- ID cards, Social Security Cards and Insurance cards
- Dependent Daycare 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
- Social Security 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 Income
- Tips
- Foreign Income

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
- Home and Real Estate Taxes
- Estimated Tax Payments to Federal and State Government and Dates Paid
- Charitable Contributions Cash/Non-Cash
- Purchase qualifying for Residential Energy Credit
- IRA Contributions/Retirement Contributions
- Home Purchase/Moving Expenses