

Tax Appointment Checklist

- **Personal information -**
 - Last year's income tax if you are a new client
 - Adjusted Gross Income Federal and State
 - 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
 - Pin# if using a IRS directed

- **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
- 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