Tax Appointment Checklist

Personal Information:

- Last 2 years of income tax returns (for new clients)
- Social Security Number for taxpayer, spouse, and dependents
- Birth dates for taxpayer, spouse, and dependents
- Current address
- Current phone number
- Social Security Cards for taxpayer, spouse, and dependents
- State issued Identification for taxpayer and spouse
- Current bank account and routing numbers if wanting direct deposit
- Proof of health insurance

Income Data Required:

- Wages and/or unemployment
- Interest and/or Dividend Income
- State/Local income tax refund
- 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 Payment to Federal and State Government and dates paid
- Home Property Taxes
- Charitable Contributions Cash/No-cash
- IRA Contributions/Retirement Contributions

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