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New Client Checklist

- ☐ A copy of the last two year's Federal and State tax returns
- ☐ Each taxpayer and dependent's date of birth
- ☐ All statements of income such as:
  - ☐ W-2's
  - ☐ Interest and Dividend statements (Form 1099)
  - ☐ Pension income amounts, including Social Security
  - ☐ Individual Retirement Account contributions or withdrawals
  - ☐ Unemployment income statements
  - ☐ Trust, S-Corporation and/or Partnership income amounts (Form K-1)
- ☐ Amounts of Mortgage interest and points paid (Form 1098)
- ☐ Real Estate and Auto taxes paid
- ☐ Charitable donations (cash and non-cash)
- ☐ Out-of-pocket medical expenses
- ☐ Records of child care expenses – including amounts, payee, payee's EIN or Social Security number, payee's address.

List any job-related expenses such as:
- ☐ Moving expenses (if your move was job-related)
- ☐ Tools and other equipment (i.e. computers)
- ☐ Safety clothing or uniforms
- ☐ Professional books, journals, dues, union dues, etc.

- ☐ Amounts of any estimated tax payments
- ☐ Details of any capital gains transactions