Tax Appointment Checklist

○ **Personal information** -	
• Last year's income tax if you are a new client	
• 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	
○ **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	
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○ **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	
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