



TAX APPOINTMENT CHECKLIST

PERSONAL INFORMATION

Last years 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

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