

Tax Appointment Checklist

- **Personal information -**
 - New Client – Last 2 years Income Tax Returns
 - Name, address, Social Security number and Date of Birth for yourself, spouse and dependents
 - Day Care/Dependent Provider, Name, Address, Tax ID or S.S.N.
 - Banking information for Direct Deposit of Refund or Payment

- **Income Data Required -**
 - W2's and 1099's
 - Unemployment Compensation
 - Interest and/or Dividend Income
 - State/Local income tax refunded
 - Pension/Annuity/Stock or Bond Sales/Virtual Currency exchanges
 - Independent Contractor Income
 - Self-Employment Income
 - Gig Income (Uber, Lyft, DoorDash, etc)
 - Rental Income
 - Tip Income
 - Partnership/Corporate/Trust/Estate Income
 - Gambling/Lottery Winnings/Prizes/Bonus
 - Foreign Income

- **Expenses and Payments -**
 - Daycare/Dependent Care Costs
 - Education/Tuition Costs/Materials Purchased

- Medical/Dental
 - Mortgage Interest/Home Equity Loan Interest/Mortgage Insurance
 - Real Estate Taxes
 - Personal Property Taxes (vehicle taxes)
 - Independent Contractor/Self Employment Expenses
 - Gig Expenses
 - Rental Activity Expenses
 - Gambling/Lottery Expenses
 - Investment Expenses
 - Estimated Tax Payments to Federal and State Government and Dates Paid
 - Charitable Contributions Cash and Non-Cash
 - Purchase qualifying for Residential Energy Credit
 - IRA Contributions/Retirement Contributions
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- **Other Information Required**
 - Sale of Main Home
 - Sale of Rental Property
 - Sale of Personal Property
 - HSA Distributions