MoneySaver
Tax Professionals

Tax Appointment Checklist

○ Personal information – (New Clients Only)

- 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 (W2 income, retirement and/or Unemployment
- Interest and/or Dividend Income
- State/Local income tax refunded
- Social Security Income
- Pension/Annuity/Stock or Bond Sales
- Pass through business Income (Schedule K-1)
- Gambling/Lottery Winnings and Losses/Prizes/Bonus (only if you have gambling winnings)
- Rental Income and expenses
- Self-Employment income and expenses
- Foreign Income

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- **Expense Data Required** -
  - Child Care Costs with provider info
  - Education/Tuition Costs/Books
  - Estimated Tax Payments to Federal and State Government and Dates Paid

- **Itemized Deductions**
  - Medical/Dental
  - Mortgage/Home Equity Loan Interest/Mortgage Insurance
  - Gambling/Lottery Expenses
    (only if you have gambling winnings)
  - 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

Will Need Letters From The IRS For Child Tax Credit Payments & Stimulus Payments Received In 2021

If Letters Are Not Available Create Account On IRS.Gov

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