Tax Appointment Checklist

- **Personal information** – **(New Clients Only)**
  - 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 Security 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** -
    - Child Care Costs
    - Education/Tuition Costs/Materials Purchased
    - Medical/Dental
    - Mortgage/Home Equity Loan Interest/Mortgage Insurance
    - 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