

Tax Appointment Checklist

What To Bring With You

- Complete Our Client Information Sheet
- Last year's income tax return
- It is helpful to bring in Social Security cards and picture I.D

o 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/Partnerships/Trust/Estate Income
- Gambling/Lottery Winnings and Losses/Prizes/Bonus
- Alimony Income
- Rental Income
- Self-Employment/Tips
- Foreign Income
- Estimated Tax Payments to Federal and State Governments and Dates Paid

o If You Would Like For Us To Determine If Certain Expenses Can Be Used We Will Need The Following

- 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/Vehicle/Boat/Motorcycle Property Taxes
- Charitable Contributions Cash/Non-Cash
- Purchase qualifying for Residential Energy Credit
- IRA Contributions/Retirement Contributions
- Home Purchase/Moving Expenses