**Tax Appointment Checklist**

o **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

 Photo copy of State Issued Drivers License or State Issued

ID (for spouse as well)

 Dependent Provider, Name, Address, Tax ID and S.S.N.

 Banking information if Direct Deposit Required

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/Partnership/Trust/Estate Income

 Gambling/Lottery Winnings and Losses/Prizes/Bonus

 Alimony Income

 Rental Income

 Self Employment/Tips

 Foreign Income

o **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