

**TAX APPOINTMENT**

**CHECKLIST**

**PERSONAL INFORMATION**

* Names and Birthdates of everyone listed on return
* Social Security Cards for everyone listed on return
* Picture ID for Primary Taxpayer & Spouse
* Bank Account information, if using direct deposit for any refund
* Copy of last year’s tax return, if new client
* Health Insurance Forms (Form 1095-A, 1095-B, 1095-C)

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| **INCOME INFORMATION**   * Wage Documents (W2) * Interest (1099-INT) * Dividends (1099-DIV) * Alimony/Spousal Support * Brokerage Statements / 1099-B * Gambling Income (W2-G)   **EXPENSES**   * Educator Expenses * Health Savings Contributions * Moving Expenses * Alimony Paid (Name and SSN) * IRA Contributions   **CREDITS & DEDUCTIONS**   * Charitable Contributions (Cash/NonCash) * Mortgage Interest (1098) * Property Tax * Child Care Expenses (SSN or EIN required)   **MISCELLANEOUS**   * 1099-S for Sale of Home/Property * K-1s from Partnerships/Corporations * Energy Efficient Home Improvements * Adoption Expenses * Union Dues * Work related Education * Foreign Bank Information   **ESTIMATES PAID**   * Federal (amount & date paid) * State (amount & date paid) | * Retirement Income (1099-R) * Social Security Statement (1099-SSA) * Unemployment (1099-G) * State Refund Info (1099-G) * Self-Employment * Rental Income * Farming Income * Student Loan Interest (1098-E) * Educational Expenses (1098-T & Proof Required) * Self-Employment * Rental * Farm * Medical Expenses   + Insurance (out of pocket)   + Out of pocket expenses at Doctor/Dentist/Chiropractor/Vision/Hearing   + Prescriptions      * Form 8606 from prior years for IRAs * Jury Duty pay * Self-Employed Pension payments * Investment Interest Paid * Uniform Expense * Work related Travel * School (amount & date paid) * City (amount & date paid) |