

**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)
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