Tax Appointment Checklist

- **Personal information**

  Taxpayer and Spouse:

  - Full Name (listed on Social Security card)
  - Address
  - Contact Telephone
  - Email Address
  - Date of Birth
  - Social Security Number

  Dependents:

  - Full Name (listed on Social Security card)
  - Date of Birth
  - Social Security Number

- **Income Data**
  - Wages and/or Unemployment
  - Interest and/or Dividend Income
  - State/Local income tax refund amounts
  - Social Assistance Income/Disability 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**
  - Child Care Costs (Must include: Child Care Provider Name, Address, Phone Number, Provider's Tax EIN/SSN)
  - Education/Tuition Costs/Materials Purchased (Forms 1098T, 1098E, 1098Q)
  - Summary of Medical/Dental out of pocket expenses
  - Mortgage/Home Equity Loan Interest/Mortgage Insurance
  - Summary of Employment Related Expenses
  - Gambling/Lottery Expenses
  - Tax Return Preparation Expenses
  - Investment Expenses
  - Real Estate Taxes (include PIN)
  - Estimated Tax Payments to Federal and State Government and Dates Paid
  - Personal Property Taxes
  - Charitable Contributions Cash/Non-Cash
  - Purchase qualifying for Residential Energy Credit
  - IRA Contributions/Retirement Contributions
  - Home Purchase/Moving Expenses

- **Other Information**
  - Last year's income tax if you are a new client
  - Banking information if direct deposit requested
  - Closing Disclosure/Settlement Statement for purchase, sale and/or ReFi of real estate property
  - Client Questionnaire (download from website)
  - Client Organizer (download from website)