

## **TAX APPOINTMENT CHECKLIST**

### **Personal Information -**

- Last years income tax return if you are a new client
- Name, address, social security number and date of birth for yourself, spouse & dependents
- Dependent care provider, name, address, tax ID number
- Banking information if Direct Deposit Requested
- E-mail Address

### **Income Data Required -**

- Wages and/or Unemployment
- Interest and/or Divident income
- State/local income tax refunded
- Social Assistance income
- Pension & Annuities
- Stock or bond sales
- Contract/partnership/trust/estate income
- Gambling/lottery winnings & losses/prizes/bonus

- Alimony income
- Rental income
- Self Employment/tips
- Foreign income

**Expense Data Required -**

- Dependent care costs
- Education/tuition costs/books & materials purchased
- Medical/dental
- Mortgage interest/mortgage insurance
- Gambling/lottery expenses
- Real estate taxes
- Estimated tax payments to Federal, state & city governments & date paid
- Home property taxes
- Charitable contributions, cash/non-cash
- IRA contributions/retirement contributions