TAX APPOINTMENT CHECKLIST
(see Tax Organizer for more details)

- **Personal Information**
  - If a new Client, a copy of previous years return
  - Name, Address, Social Security Number & Dates of Births for yourself, spouse and dependents
  - Telephone number
  - If your want to have your refund direct deposited, we need a copy of your bank account information
  - Copies of your unexpired license/passport

- **Income**
  - Wages (W2) and/or Unemployment (1099G)
  - Self-Employment Income (1099NEC or 1099MISC)
  - Interest & Dividend Income (1099INT & 1099DIV)
  - Seller Financed Mortgage Interest
  - Installment Sale Income
  - Stock Sales (1099B)
  - State/Local Income Tax Refund from previous year (1099G)
  - Social Security Income
  - Pension/Annuity/IRA Distributions (1099R)
  - HAS Withdrawals (1099SA)
  - S-Corporation/Partnership/Estate/Trust Income (K1)
  - Gambling/Lottery Winnings (1099G)
  - Alimony Income
  - Rental Income (1099MISC)
  - Royalty Income (1099MISC)
  - Tip Income (not reported by employer)
  - Foreign Income

- **Expenses**
  - Dependent Care Costs (Need Name, Address & Tax ID)
  - Teacher Expenses
  - Student Loan Interest
  - Alimony Paid
  - Medical, Dental & Health Insurance Paid
  - Mortgage Interest
  - Real Estate Taxes (Copy of final bill)
  - Vehicle Registration
  - Charitable Contributions (Cash & Non-Cash listed separately)
  - Self-Employment Expenses (Itemized)
  - HSA Contributions (other than reported on W2)
  - Rental Expenses (Itemized)
  - Adoption Expenses