Tax Appointment Checklist

- **Personal information -**
  - Last years income tax if you are a new client
  - Name, address, Social Security number and Dates of Birth for yourself, spouse and dependents
  - Dependent Provider, Name, Address, Tax ID or S.S.N.
  - Banking information if Direct Deposit Required (voided check)

- **Income data required -**
  - W2 Wages and/or Unemployment
  - 1099 Interest and/or Dividend Income
  - 1099 Brokerage Statements
  - 1099G State/Local Income Tax Refunds
  - Social Assistance Income
  - 1099R Pension/Annuity/Stock or Bond Sales
  - K1 Contract/Partnership/Trust/Estate Income
  - W2G Gambling/Lottery Winnings and Losses/Prizes/Bonus
  - Alimony Income / Date of Final Divorce
  - Rental Income and Related Expenses
  - Self-Employment/Tips and Related Expenses
  - Foreign Income / Foreign Assets

- **Expense Data Required – Itemized Deductions / Credits**
  - Dependent Care Costs for each dependent
  - Education/Tuition Costs/Materials Purchased
  - 529 Contributions / Withdrawals
  - Medical/Dental out of pocket costs
  - 1098 Mortgage/Home Equity Loan Interest Statement
  - Employment Related Expenses
  - Gambling/Lottery Expenses
  - Tax Return Preparation Expenses (previous year)
  - Investment Expenses
  - Real Estate Taxes
  - Estimated Tax Payments to Federal / State - dates paid
  - Home Real Estate Taxes and personal property Tax
  - Charitable Contributions Cash/Non-Cash
  - Purchase qualifying for Residential Energy Credit
  - IRA Contributions/Retirement Contributions
  - Home Purchase/Moving Expenses

Note - this is a generic list of the most common tax forms. It is to be used as guide to assist in gathering your documents.
Please use your personal assigned secure share file portal to securely submit your tax documents.