



APPOINTMENT CHECKLIST

» Personal information -

- Last year's tax return if you are a New Client
- Copies of Social Security cards and ID's for self, spouse and dependent
- Banking information if Direct Deposit Required

» Income Data Required (if applicable) -

- Wages / 1099s
- Unemployment Income
- Interest and/or Dividend Income
- State/Local income tax refunded
- Social Security Income
- Retirement Income
- Pension/Annuity/Stock or Bond Sales
- Contract/Partnership/Trust/Estate Income
- Gambling/Lottery Winnings and Losses/Prizes/Bonus
- Rental Income
- Self Employment/Tips
- Foreign Income

» Expense Data Required -

- Dependent Care Costs (Daycare EIN information required)
- Education/Tuition Tax Forms
- Costs/Materials Purchased
- Medical/Dental Expenses
- Mortgage Interest/Home Equity Loan Interest/Mortgage Insurance
- Gambling/Lottery Expenses
- Real Estate Taxes
- Estimate Tax Payments to Federal and State Government and Dates Paid
- Property Taxes (Home and Personal)
- Charitable Contributions Cash/Non-Cash
- IRA Contributions/Retirement Contributions