Tax Appointment Checklist

- **Personal information** -
  - ☐ Last year's income tax return (if you are a new client)
  - ☐ Complete the 'New Client Information Form' (see tab on home page)
  - ☐ Dependent Care Provider, Name, Address, Tax ID or S.S.N.
  - ☐ Banking information if Direct Deposit requested

- **Income Data Required** -
  - ☐ Wages, Tips and/or Unemployment
  - ☐ Interest and/or Dividend Income
  - ☐ State/Local income tax refunded
  - ☐ Social Security Income
  - ☐ Pension/Annuity
  - ☐ Stock, Bond Sale, or other sales
  - ☐ K-1's from Partnerships, Corporations, Trusts, or Estates
  - ☐ Gambling/Lottery Winnings and Losses/Prizes/Bonus
  - ☐ Alimony Income
  - ☐ Rental Income and Expenses
  - ☐ Self Employment Income
  - ☐ Foreign Income

- **Expense Data Required** -
  - ☐ Dependent Care Costs
  - ☐ Education/Tuition Costs/Materials Purchased
  - ☐ Medical/Dental
  - ☐ Mortgage/Home Equity Loan Interest/Mortgage Insurance
  - ☐ Employment Related Expenses
  - ☐ Gambling/Lottery Expenses (if you have winnings)
  - ☐ Tax Return Preparation Expenses
  - ☐ Investment Expenses
  - ☐ Real Estate Taxes
  - ☐ Estimated Tax Payments to Federal and State Government and Dates Paid
  - ☐ Home Property Taxes
  - ☐ Charitable Contributions Cash/Non-Cash
  - ☐ Energy Improvements to Your Property
  - ☐ IRA Contributions/Retirement Contributions
  - ☐ Home Purchase/Moving Expenses