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Tax Appointment Checklist

Personal Information

- Last years' tax return (New Clients)
- Name, Address, Social Security Number, Date of Birth for yourself, spouse and dependents.
- Driver's License Number, Issue Date, Expiration Date and State issued from for yourself and spouse.
- Bank Routing and Account Number for Direct Deposit or Direct Debit

Tax Forms and Statements for Yourself, Spouse and Dependents

- W-2 forms for all jobs worked in tax year.
- All 1099 Forms for interest, dividends, retirement, Social Security, state/local refunds, gambling winnings, miscellaneous income, etc.
- Brokerage statements showing investment transactions for stocks, bonds, etc.
- Schedule K-1 for partnerships, S corporations, estates and trusts.
- Statements supporting educational expenses, deductions or distributions, including any Forms
    - 1098-T, 1098-E, or 1099-Q.
- All Forms 1095-A, 1095-B, and/or 1095-C related to health care coverage or the Premium Tax Credit
- Statements supporting deductions for mortgage interest, taxes, and charitable contributions (including any Form 1098-C).

Other Miscellaneous Items

- Copies of closing statements regarding the sale or purchase of real property.
- Legal papers for adoption, divorce, or separation involving custody of your dependent children.
- Landlord contact information.
- Any tax notices sent to you by the IRS or other taxing authority.
- Estimated Tax payments amounts and dates.
- Gambling loses.
- Dependent Care costs and provider information.