

Please review this questionnaire and bring the appropriate items to your appointment. Contact us if you have any questions.

Tax Appointment Checklist

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

- o **Income Data Required -**
 - Wages and/or Unemployment
 - Interest and/or Dividend Income
 - State/Local income tax refunded
 - Social Assistance Income
 - Pension/Annuity/Stock or Bond Sales
 - Contract/Partnership/Trust/Estate Income
 - Gambling/Lottery Winnings and Losses/Prizes/Bonus
 - Alimony Income
 - Rental Income
 - Self Employment/Tips
 - Foreign Income

- o **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
 - 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
 - Purchase qualifying for Residential Energy Credit
 - IRA Contributions/Retirement Contributions
 - Home Purchase/Moving Expenses