TAX APPOINTMENT CHECKLIST

PERSONAL INFORMATION:

- Prior two years income tax returns and two forms of identification (new client)
- Name, address, Social Security number and Date of Birth for yourself, spouse and dependents
- Health insurance forms from Market Exchange or Carrier—must have **1095A** form if you received insurance through the exchange. Bring forms 1095A, 1095B and/or 1095C if received.
- Banking information for Direct Deposit

INCOME DATA REQUIRED:

- Wages (w-2s) and/or Unemployment Statements(1099-G)
- Interest and/or Dividend Statements(1099-Int/1099-Div)
- State/Local Income Tax Refunds(1099-G)
- Pension/Annuity Statements (1099R)
- Stock/Bond Sales Statements(1099B)
- Social Security Income Statement(SSA-1099)
- Contracts/Partnership/Trust/Estate Income—usually on a K-1
- Gambling(w-2G)/Lottery Winnings and Losses/Prizes/Bonus
- Alimony Income
- Rental Income
- Self Employment/ Tips
- Hobby Income
- Foreign Income

EXPENSE DATA REQUIRED:

- Dependent Care Costs and Provider Name, Address, Tax ID # or Social Security #
- Education/Tuition Costs/Materials Purchased/Room &Board—must have 1098-T from Institution
- Gambling/Lottery Losses
- Medical/Dental Expenses
- Mortgage/Home Equity Loan Interest/Mortgage Insurance
- Real Estate Taxes
- Charitable Contributions Cash/Non-Cash—you need to have receipts
- IRA Contributions/Retirement Contributions
- Home Purchase/Sale
- Moving Expenses