



Tax Appointment Checklist

Personal:

- Social Security Card(s) - Spouse & Children
- Birth Certificates for Children
- School or medical records showing children lived with you, if you plan on receiving the Earned Income Tax Credit.
- Driver's License(s)
- Dependent's' Social Security Numbers & Dates of Birth
- Last Year's Federal & State Tax Returns
- Form 1095-A, 1095-B, or 1095-C Health Coverage

Income:

- Wage Statements- Form W-2
- Pension or Retirement Income - 1099-R
- Interest & Dividend Income - Form 1099-INT/Form 1099-DIV
- Proceeds from Broker Transactions- Form 100-B
- State & Local Income Tax Refund Amounts- Form 1099-G
- Social Security Income- Form SSA-1099
- Unemployment Income- Form 1099-G
- Miscellaneous Income Including Rent - Form 1099-MISC
- Commissions Received
- Commissions Paid
- Sales of Stocks or Bonds - Form 1099-B
- Self-Employed Business/Farm Income & Expenses- Form 1099-MISC
- Self-Employed Business Related Expenses- Receipts, Documents, Records
- Farm-Related Expenses - Receipts, Documents, Records
- Employment Taxes & Other Business Taxes Paid for Current Year
- Lottery or Gambling Winnings - Form W-2G
- Lottery or Gambling Losses Prizes & Awards
- Income & Expenses From Rentals
- Income from Partnerships, S Corporations, Trusts, & Estates Schedule K-1
- IRA/401K Contributions & Distributions
- Alimony Paid or Received
- Jury Duty Pay

Expenses/Deductions/Credits:

- Child Care Expenses & Provider Information - Including Tax I.D.or Social Security Number
- Adoption Expenses
- Medical, Eye Care, & Dental Expenses
- Medical Savings Accounts
- Cash & Noncash Charitable Donations
- Record of Purchase or Sale of Real Residence
- Mortgage or Home Equity Loan Interest Paid - Form 1098
- Real Estate & Personal Property Taxes
- Moving Expenses
- Investment Expenses
- Residential Addresses(s) for this Year
- Rent Paid During the Year
- Solar Improvement Expenses
- Unreimbursed Employment-Related Expenses
- Unreimbursed Volunteer-Related Expenses
- Job-Related Educational Expenses
- Job-Hunting Expenses
- Educator Expenses
- Tuition & Education Fees- Form 1098-T
- Student Loan Interest - Form 1098-E
- Scholarships & Fellowships
- Casualty or Theft Losses
- Early Withdrawal Penalties on COs & Other Time Deposits
- Federal, State & Local Estimated Income Tax Paid for Current Year.
- Vouchers, Cancelled Checks & Other Payment Records
- IRA, Keogh & Other Retirement Plan Contributions- If Self Employed, Identify if for Self or Employees
- Foreign/Other Taxes Paid
- State & Local Tax Payments
- Other Interest Paid
- Auto Loans & Leases if Vehicle Used for Business
- Gifts to Charity (Qualified Written Statement from Charity for any Single Donation of \$250 or More)
- Tax Preparation Expenses & Fees