**Tax Appointment Checklist**

**PERSONAL INFORMATION**

* Last 2-3 income tax returns if you are a new client
* Name & Address
* Social security number for yourself, spouse and dependents
* Identity Protection PIN (if you have been a victim of identity theft)
* Date of birth for yourself, spouse and dependents
* Dependent provider, name, address and tax ID
* Banking information if direct deposit required

**INCOME DATA**

* Wages and/or unemployment income (e.g., w2, 1099-Misc, 1099-G, etc.)
* Interest and/or dividend income (e.g., 1099-int, 1099-div)
* State/Local income tax refunded
* Social assistance income (e.g., SSA-1099, etc.)
* Pension/Annuity (1099-R, etc.)
* Stock or bond sales (and cost basis information) (e.g., 1099-B, etc.)
* K-1 from Partnership/SCorp/Trust/Estate Income
* Gambling/Lottery winnings (e.g., w2-G)
* Alimony income
* Rental income
* Self Employment/Tips
* Foreign Income

**DEDUCTION DATA**

* Medical/Dental
* Mortgage/Home equity loan interest/Mortgage insurance (e.g., 1098, etc.)
* Real estate taxes
* Sales tax
* State income taxes
* Alimony paid (will need payee-spouse SSN)
* Dependent Care Costs
* Education/Tuition costs/Materials purchased (e.g., 1098-T, etc.)
* Student Loan Interest Payments (e.g., 1098-E, etc.)
* Employment related expenses
* Gambling/Lottery losses
* Tax return preparation expenses
* Investment expenses
* Estimated tax payments to federal and state government and dates paid
* Charitable contributions cash/non-cash (thrift value)
* Cost of qualifying residential energy purchases
* IRA contributions/Retirement contributions (e.g., Form 5498, etc.)
* Home purchase/Moving expenses
* Health Insurance Premiums (paid out of pocket)
	+ Note that if you purchased health insurance coverage through a health insurance marketplace you may be eligible for the premium tax credit (PTC). Bring proof that your health insurance plan is qualified and that you paid the qualified health insurance premiums.

**\*Note that this list is meant to be a guide of the most commonly (not ALL) referenced source documents. Rule of thumb is to provide any and all documents that say “Important Tax Document” or similar language.**