# Tax Appointment Checklist

- **Personal information** -
    - Last year's income tax return if you are a new client
    - Name, address, Social Security Number (SSN) and date of birth for yourself, spouse and dependents
    - Dependent provider, name, address, Tax ID and SSN
    - Banking information, if Direct Deposit is requested

- **Income Data Required** -
    - Wages and/or unemployment benefits
    - Year-end paycheck stub
    - Proof of Health Insurance coverage
    - Interest and/or dividend income
    - State/Local income tax refunds
    - Social Assistance income
    - Pension/Annuity/Stock or Bond Sales
    - Contract/Partnership/Trust/Estate Income
    - Gambling/Lottery Winnings and Losses/Prizes/Bonuses
    - Alimony income
    - Rental income
    - Self Employment/Tips
    - Foreign income

- **Expense Data Required** -
  - Dependent Care Costs
  - Education costs, tuition, 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 made to Federal and State Government and dates paid
  - Property Taxes
  - Charitable Contributions Cash/Non-Cash
  - Purchase(s) qualifying for Residential Energy Credit
  - IRA Contributions/Retirement Contributions
  - Home Purchase/Moving Expenses