

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)
- Dependents' 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