**Tax Appointment Checklist**

* + **Personal information** -
* Last years income tax if you are a new client
* Name, address, Social Security number and Date of Birth for yourself, spouse and dependents
* Dependent Provider, Name, Address, Tax ID and S.S.N.
* Banking information if Direct Deposit Required
* Driver’s License Number with Issue and Expiration Dates
* Occupation
  + **Income Data Required** -
* Wages and/or Unemployment
* Interest and/or Dividend Income
* State/Local income tax refunded
* Social Assistance Income
* Pension/Annuity/Stock or Bond Sales
* Contract/Partnership/Trust/Estate Income
* Gambling/Lottery Winnings and Losses/Prizes/Bonus
* Alimony Income
* Rental Income
* Self Employment/Tips
* Foreign Income
* Sale of purchase of a home and rental property income
  + **Expense Data Required** -
* Dependent Care Costs
* Education/Tuition Costs/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 to Federal and State Government and Dates Paid
* Home Property Taxes
* Charitable Contributions Cash/Non-Cash
* Purchase qualifying for Residential Energy Credit
* IRA Contributions/Retirement Contributions
* Home Purchase/Moving Expenses