Tax Preparation Checklist

Provide a copy of a current valid driver's license for you and your spouse required by the Internal Revenue Service

Personal Information:

New Clients – Please provide all of the following; Returning Clients – Let us know if any of the following information has changed:

- Last years' income tax return
- Names (First, Middle, Last), address, date of births and social security numbers for you, your spouse and all your dependents
- Dependent's childcare provider's name, address and Tax ID or social security number
- Banking information for direct deposit: Bank Name, Bank Account Number, and Bank Routing Number

Income Information (provide all that is applicable to you)**:**

- Wages (W-2)
- Gambling & Lottery Winnings (W-2G)
- Contract/Partnership/Trust/Estate Income (1099-MISC)
- Rental Income (1099-MISC)
- Self-Employment Tips (1099-MISC)
- Interest Income (1099-INT)
- Dividend Income (1099-DIV)
- State/Local Income Tax Refund (1099-G)
- Unemployment Income (1099-G)
- Stock or Bond Sales (1099-B)
- Pension/Annuity Income (1099-R)
- Alimony Income
- Foreign Income

Expense Data Required (provide all that is applicable to you)**:**

- Dependent Care Costs
- Health Insurance (1095-A, 1095-B or 1095-C)
- Medical, Dental, and Vision Expenses
- Employment Related Expenses
- Gambling/Lottery Expenses
- Education Expenses: Tuition (1098-T), Books and Supplies
- Mortgage & Home Equity Loan Interest, Mortgage Insurance (1098)
- Real Estate Taxes (Home Property Taxes)
- Tax Return Preparation Expenses
- Investment Expenses
- Personal Property Taxes (Auto Registrations)
- Estimated Tax Payments to Federal and State Government with Dates Paid
- Charitable Contributions (Cash/Non-Cash)
- Purchase Qualifying for Residential Energy Credit
- IRA/Retirement Contributions
- Moving Expenses