**Tax Appointment Checklist**

**Personal Information:**

* Last 3 years of income tax returns (for new clients)
* Social Security Number for taxpayer, spouse, and dependents
* Birth dates for taxpayer, spouse, and dependents
* Current address
* Current phone number
* Social Security Cards for taxpayer, spouse, and dependents
* State issued Identification for taxpayer and spouse
* Birth certificates for dependents
* Current bank account and routing numbers if wanting direct deposit
* Proof of health insurance

**Income Data Required:**

* Wages and/or unemployment
* Interest and/or Dividend Income
* State/Local income tax refund
* 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

**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 Payment to Federal and State Government and dates paid
* Home Property Taxes
* Charitable Contributions Cash/No-cash
* Purchase qualifying for Residential Energy Credit
* IRA Contributions/Retirement Contributions
* Home Purchase/Moving Expenses