**Tax Appointment Checklist**

* + **Personal information**
* Last year’s income tax return (if you are a new client)
* Name, address, Social Security number, and date of birth for yourself, spouse, and dependents
* Dependent care provider name, address, and EIN/SS#
* Banking information (routing & account numbers)
  + **Income Data Required**
* Wages (W-2)
* Unemployment (1099-G)
* Interest Income (1099-INT)
* Dividend (1099-DIV)
* State/Local income tax refunded
* Social Assistance Income (1099-SSA)
* Pension/Annuity (1099-R)
* Stock or Bond Sales (1099-B)
* Contract/Partnership/Trust/Estate Income (K-1)
* Gambling/Lottery Winnings and Losses/Prizes/Bonus (W-2G)
* Alimony Income
* Rental Income (1099-MISC)
* Self Employment/Tips (1099-NEC)
* Foreign Income
  + **Expense Data Required**
* Student Loan Interest (1098-E)
* Dependent Care Costs
* Education/Tuition Costs/Materials Purchased (1098-T)
* Medical/Dental expenses
* Mortgage/Home Equity Loan Interest (1098)
* Self-Employment Related Expenses
* Real Estate Taxes
* Estimated Tax Payments and dates paid
* Charitable Contributions (Cash/Non-Cash)
* Purchase qualifying for Residential Energy Credit
* IRA Contributions/Retirement Contributions
* Home Purchase/Sale information