New Client Tax Appointment Checklist

# Personal Information -

* Last two years income tax returns
* Name, address, S.S.N., 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

# 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

**Trust/Estate Information** –

* Trust Instrument/Will
* EIN Letter
* Trustee/PR Contact information/S.S.N./Address
* Beneficiary list with S.S.N./Address
* Death Certificate (if an estate)
* Copies of prior two years tax returns (if applicable)
* Estate Inventory Filing/Trust funding history

**Expense Data Required** -

* Dependent Care Costs
* Education/Tuition Costs/Materials Purchased
* Medical/Dental
* Mortgage/Home Equity Loan Interest/Mortgage Insurance
* Gambling/Lottery Expenses
* Prior Tax Return Preparation 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