Tax Preparation Checklist

If we don't have a copy of a valid driver's license for you and your spouse on file, please send us a copy, as required, by the Internal Revenue Service

-Personal Information:

New Clients – Please provide all of the following:
Returning Clients- Let us know if you have any changes with the following:

- Last years' income tax return
- Name, address, date of birth and social security number for you, your spouse and your dependents
- Dependent's childcare provider's name, address and tax id or social security number
- Banking information for direct deposit

-Income Information:

- 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:

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