**Tax Appointment Checklist**

* + **Personal information** -
* Last 2-3 years income tax if you are a new client
* Social Security Cards for you, your spouse and all dependents
* Birth Certificate for each dependent
* Form 8332- Release of Claim to Exemption for Child by Custodial Parent
* Current Drivers License for yourself and your spouse
* Name, address, and Date of Birth for yourself, spouse and dependents
* Proof of Health Insurance (Forms 1095-A, B, and/or C)
* Dependent Care Provider, Name, Address, Tax ID and/or 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
* Social Security and/or Disability Income statements
* Pension/Annuity/Stock or Bond Sales
* Contract/Partnership/Trust/Estate Income
* Gambling/Lottery Winnings and Losses/Prizes/Bonus
* Alimony Income
* Rental Income
* Self Employment Income / Tips
* Foreign Income
  + **Expense Data Required** -
* Dependent Care Costs
* Education/Tuition Costs/Materials Purchased
* Medical/Dental Miles and out of pocket expenses
* Cancer Policy Premiums
* Mortgage/Home Equity Loan Interest/Mortgage Insurance
* Employment Related Expenses
* Gambling/Lottery Expenses
* Tax Return Preparation Expenses
* Investment Expenses
* Real Estate Taxes
* Ad Valorem Taxes (tax paid on car tags)
* 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
* Home Purchase/Moving Expenses