Tax Appointment Checklist

o Personal information

● The last two years of income tax returns if you are new to my firm.

● Name and/or name changes, address and /or address changes, social security number and date of birth for yourself, spouse, and dependents.

● Dependent care provider information such as, name, address, federal tax number or

S.S.N. This required for taxpayers with children under the age of 13 and in

after school care or daycare.

● Banking information if direct deposit or direct debit is

required.

● Proof of health insurance for 2023 if your insurance was

issue from the HealthCare Marketplace. You will need to bring Form 1095A

● Your IP PIN that was sent to you in December by the

Internal Revenue Service if you have been a Victim of

identity theft in the past or if you participated in the

program at any point in the past.

● If you are a homeowner, I will need the 1098 mortgage

interest statement and your property tax bill. If you cannot find your

mortgage information you can call the company that hold’s

your mortgage and ask for the information over the phone.

This will be sufficient. You will ask them for all information on

the 1098 Mortgage Interest Statement. Also, any

information on a second mortgage such as a HELOC. If you

cannot find your tax bill, you can obtain it by going to your

county's property tax website and print the bill there. I will need

it to determine the ad valorem taxes and non-ad valorem

assessments.

o All sources of income data Required

● Wages and/or Unemployment = W-2s or 1099G

● Interest and/or Dividend Income = 1099 Int /1099 Div.

● Stock or Bond Sales = 1099B

● State/Local Income Tax Refund = 1099G

● Social Security or Disability Income

● Pension/Annuity Withdraws, RMDs = 1099R

● 1120S/Partnership/Trust/Estate Income = K-1

● Gambling/Lottery Winnings/Prizes/Bonus = W-2G or 1099M

● Alimony Income = Only for divorce settlements prior to

12-31-2018

● Rental Income

● Self-Employment Income

● Tips

● Foreign Source Income

● Inheritance

● All other income of any kind!

o Expense Data Required -

● Dependent Care Costs

● Education/Tuition Costs/Materials Purchased

● Medical/Dental

● Mortgage/Home Equity Loan Interest/Mortgage Insurance

● Gambling/Lottery Expenses

● Real Estate Taxes

● Estimated Tax Payments to Federal and State Government

Agencies and Dates Paid

● Home Property Taxes

● Charitable Contributions Cash/Non-Cash

● Purchase information for qualifying Solar Residential Energy Credit and/or Electric Vehicle Credit

● IRA Contributions/Retirement Contributions

● New Home Purchase = HUD 1 closing statement

● Moving Expenses only if you are Military or Government

● A paper copy of your business expenses and /or mileage log

if you are self employed