**Individual Tax Appointment Checklist**

*Note: if you are a new client, please provide 2 prior tax returns and supporting documents*.

* + **Personal information** -
* Name, address, Social Security card and Date of Birth for yourself, spouse and dependents
* Driver’s license copy for primary taxpayer and spouse
* Day care (Dependent Care) Provider, Name, Address, Tax ID and SSN
* Banking information if Direct Deposit requested
* Divorce decree, if recent
* Signed form 8332 if you are not the parent your children reside with
  + **Income Data Required** -
* Wages (W-2) and/or Unemployment
* Interest and/or Dividend Income (bank & investment statements)
* Pensions, Annuities, Stocks, Bonds
* Corporate, Partnership, Trust, Estate Income (K-1)
* Gambling or Lottery Winnings, Prizes, Bonuses
* Alimony Income received or paid out
* Rental Income
* 1099 s, Self-Employment income, Tips
* Foreign Income, bank accounts and assets
  + **Expense Data Required** -
* Child Day care & Dependent Care Costs
* Education/Tuition Costs/Materials Purchased (1098T from college, grade school/high **school statement**, **school bill** for college)
* **1095-A, 1095-B or 1095-C – All copies received**
* Medical/Dental/Vision amounts paid out of pocket (including insurance bills) – This may also be on your final pay stub
* Mortgage/Home Equity Loan Interest/Mortgage Insurance
* Employment Related Expenses not reimbursed
* Gambling/Lottery Expenses & losses
* Tax Return Preparation Expenses
* Investment Expenses
* Real Estate Taxes
* Estimated Tax Payments to Federal and State Government and Dates Paid
* Charitable Contributions Cash/Non-Cash
* Purchase qualifying for Residential Energy Credit (only solar qualifies for 2017 and later)
* IRA Contributions/Retirement Contributions
* Home Purchase/Moving Expenses (HUD-1 if a purchase)