

Tax Appointment Checklist

- **Personal information -**
 - Last years income tax return, ** required of new clients*
 - Full Name, address, Social Security # or Tax ID, and Date of Birth for yourself, spouse and dependents, **new clients must also provide Social Security cards for each person on the return, along with a drivers license or Government issued ID.*
 - Marital Status (circle one: Married, Legally Separated, Divorced, Single, Widow, Single with Dependents)
 - Date of Divorce Finalized
 - Date of Legal Separation (Need spouses name, SS#, Date of Birth)
 - Dependent Care Provider, Name, Address, Tax ID and S.S.N.
 - Bank Name, Account and Routing Numbers required if Direct Deposit or Direct Withdraw
 - In Illinois, school registration fees, tuition expenses
 - In Illinois, Contributions to a 529 College Savings Plan

- **Income Data Required -**
 - Wages and/or Unemployment (W2 or 1099-G)
 - Interest and/or Dividend Income (1099-INT, 1099-DIV)
 - Stock or Bond Sales (1099-B, full document)
 - State/Local income tax refunded
 - Social Security Benefits (SSA-1099)
 - Pension/Annuity (1099-R)
 - Contract/Partnership/Trust/Estate Income (K-1)
 - Gambling/Lottery Winnings and Losses/Prizes/Bonus (W2G)
 - Alimony Income (if divorced on or before 12/31/2018)
 - Rental Income along with expenses

- Self Employment/Tips
- HSA Distributions (1099-SA)
- Cancellation of Debt (1099-C)
- Education Plan Distributions (1099Q)
- Non-Employee Compensation (1099-NEC)
- Miscellaneous Income or Royalties (1099-MISC)
- Foreign Income
- Health Insurance Marketplace Form 1095A

- **Expense Data Required -**
 - Dependent Care Costs
 - Education/Tuition Costs/Materials Purchased
 - Medical/Dental/Prescriptions/Medical Miles driven
 - Mortgage/Home Equity Loan Interest/Mortgage (1098)
 - Gambling/Lottery Expenses
 - Real Estate Taxes for personal residence and investment property)
 - Estimated Tax Payments and Dates paid to Federal and State
 - Charitable Contributions Cash/Non-Cash/Volunteer out of pocket expenses
 - Purchase qualifying for Residential Energy Credit
 - IRA Contributions/Retirement Contributions
 - Alimony Paid (if divorced on or before 12/31/2018)
 - If Self-Employed, Home office expenses (utilities, % of business use on phone, internet)
 - Self-Employment business expenses, including mileage
 - Teacher / Educator Expense