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Tax Appointment Checklist

Please Bring With You:

	New Client? Copies of Last Year's Federal and State Tax Returns
	Driver's License or ID(s) ~ You & Spouse
	Social Security Card(s) & Dates of Birth ~ You, Spouse and any Dependents
	Copies of Birth Certificates, Medical or School Records for Earned Income Tax Credits
	Health Care Coverage Form 1095-A, 1095-B or 1095-C*

Income:

	Wage Documents Form W-2
	All Self-Employed Business Income/ Form 1099-MISC
	Social Security Benefits Form SSA-1099
	Pension or Retirement Income 1099-R
	Unemployment/ Paid Family Leave Form 1099-G
	Interest & Dividend Income Form 1099-INT/Form 1099-DIV
	Stocks/Investment/Broker Income & Expenses Form 1099-B
	State Tax Refund Form 1099-G
	Gambling Winnings Form W-2G & Win/Loss Statement From Casino(s)
	Income From Rentals
	Income from Partnerships, C Corps, S Corps, Trusts, & Estates Form K-1
	Alimony/Spousal Support
	Medical Savings Accounts, HSA's, Form 1099-SA or Form 5498-SA
	IRA/401K Contributions & Distributions, Form 5498
	Record of Estimated Tax Payments Made

Deductions/Expenses:

	Child Care Provider Information: Social/Tax ID No., Address, Phone No. & Amount Paid
	Medical, Dental, Vision Expenses and Mileage
	Charitable Contributions Cash, Non-Cash Records and Mileage
	Purchase or Sell a Home? Final Closing Settlement Statement (HUD-1)
	Mortgage Interest Statement Form 1098
	Real Estate & Personal Property Taxes (DMV Fees)
	Sales Tax Paid on New Vehicle Purchases
	Unreimbursed Moving Expenses, If you moved more than 50 miles for work.
	Unreimbursed Employment-Related Expenses (Dues, Publications, Tools, Uniforms & Cleaning, Travel Etc.)
	Unreimbursed Volunteer-Related Expenses
	Unreimbursed Work Related Education Expenses
	Job Search Expenses
	Qualified Tuition/Scholarships Form 1098-T (See Qualified Education Expense Organizer)
	Student Loan Interest Form 1098-E
	Other Interest Paid
	Auto Loans & Leases if Vehicle Used for Business
	Last Year's Tax Preparation Fees
	Employment Taxes & Other Business Taxes Paid in Current Year
	Rental Assets for Depreciation (Asset, Cost and Purchase Date)