

*Anne Vidunas-Gladwell, CPA*

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## **Tax Appointment Checklist**

- **Personal information -**
  - Banking information if Direct Debit or Deposit is desired
  - Social Security Card and birth certificate if you had a child during the tax year
  - Copy of Driver's Licenses for you and spouse
  
- **Income Data -**
  - Wages and/or Unemployment (W-2, 1099)
  - Interest and/or Dividend Income (1099)
  - State/Local income tax refund
  - Social Security Income
  - Pension/Annuity/Stock or Bond Sales (1099)
  - Contract/Partnership/Trust/Estate Income (K-1)
  - Gambling/Lottery Winnings and Losses/Prizes/Bonus
  - Alimony Income if divorce finalized prior to 2019
  - Rental Income
  - Self-Employment/Tips
  - Foreign Income

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○ **Expense Data -**

- Dependent Care Costs (Name and Employer ID)
- Education/Tuition Costs/Materials Purchased (1098-T)
- Medical/Dental
- Mortgage/Home Equity Loan Interest/Mortgage Insurance
- Real Estate Taxes
- Estimated Tax Payments to Federal and State Government and Dates Paid
- Charitable Contributions Cash/Non-Cash
- IRA Contributions/Retirement Contributions
- Alimony paid if divorce finalized prior to 2019
- State Income Taxes

○ **Self Employed Individuals-**

- Business Income
- Business Expenses
- If deducting auto expenses, Make and Model of vehicle, date placed into service, beginning miles and ending miles for the year, business miles driven during the year

