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New Client Tax Appointment Checklist

- **Personal information** -
  - Prior year income tax return
  - Social Security Cards or copies for you, spouse and dependents
  - Birth Certificates or copies for dependents
  - Birthdates for you and spouse
  - Banking information if Direct Debit or Deposit is desired
  - 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 (Provider, Tax ID number and amount paid)
  - Education/Tuition Costs/Materials Purchased (1098-T)
  - Medical/Dental
  - Mortgage/Home Equity Loan Interest/Mortgage Insurance
  - State Income Taxes
  - Real Estate Taxes
  - Estimated Tax Payments to Federal and State Government and Dates Paid
  - Charitable Contributions Cash/Non-Cash
  - Alimony paid if divorce finalized prior to 2019

- **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

CPA