<u>Tax Appointment Checklist</u>

If you are a new client, please complete our new client form located on our website under the resources tax.

- **Income Data Required -**
  - Wages and/or Unemployment
  - Interest and/or Dividend Income
  - State/Local income tax refunded
  - Social Assistance Income
  - Pension/Annuity/Stock or Bond Sales
  - Contract/Partnership/Trust/Estate Income
  - Gambling/Lottery Winnings and Losses/Prizes/Bonus
  - Alimony Income
  - Rental Income
  - Self Employment/Tips
  - Foreign Income

- **Expense Data Required -**
  - Dependent Care Costs
  - Education/Tuition Costs/Materials Purchased
  - Medical/Dental
  - Mortgage/Home Equity Loan Interest/Mortgage Insurance
  - Employment Related Expenses
  - Gambling/Lottery Expenses
  - Tax Return Preparation Expenses
  - Investment Expenses
  - Real Estate Taxes
  - Amount and Dates Estimated Tax Payments made to Federal and State
  - Home Property Taxes
  - Charitable Contributions Cash/Non-Cash
  - IRA Contributions
  - Home Purchase/Moving Expenses