

Tax Appointment Checklist

- Social Security Number & Date of Birth [Self]
- Social Security Number & Date of Birth [Spouse] (if applicable)
- Social Security Number & Date of Birth [Dependents] (if applicable)
 - Daycare information, Daycare Expenses and EIN for taxes
 - Name of School, City of School, Grade for current tax year (K-12) Registration fees & cost of supplies
 - College information, form 1098-T, Expenses needed to graduate (College)
- Bright Start/Bright Directions Contributions
- W2s for you (and/or your spouse)
- W2Gs (gambling wins)
- 1099-Rs (this is pensions and retirement account withdrawals)
- 1099-MISC (any miscellaneous income)
- 1099-NEC (non-employee compensation)
- 1099-K (generally self-employed income or income from a selling platform)
- 1099-C (Cancellation of debit)
- End of Year brokerage Statement (with cost basis)
- 1099 Consolidated (These are for brokerage accounts or investment accounts with stocks)
- 1099B (sales of stock)
- 1099DIV (dividends)
- 1099INT (interest)
- 1098-T (tuition)
- Energy Improvements Receipts – Windows, doors, furnace, air, hot water heater, insulation
- IRA and/or ROTH IRA contributions made independently.
- Bank information (routing number, account number, bank name)
- Alimony paid or Received (divorce date or Separation agreement)
- Mortgage Interest Statement 1098
- Property Tax info and PIN
- Medical Expenses (totals) (see separate worksheet)
- Charitable contributions are divided between monetary and goods.
- Gambling Losses
- Business records for self-employed income and expenses
- Social Security Statements SSA-1099
- Railroad Retirement forms
- Rental Property Records Income and Expenses
- Estimated payments made to the IRS and/or State.
- Educator Expenses (teachers) & PEL Number
- Sales Tax on Large purchases
- HUD (for sale or refi of you home)
- IP PIN (Identity Protection Pin if applicable)
- Past 2 years Tax Returns (new clients only)
- REPEAT CLIENTS ONLY: If you are picking up or dropping off tax documents for any person besides yourself, we need a signed letter from the individual.
- Payment of \$89.00 we accept Cash, Check, Zelle, and Debit and Credit