

Tax Appointment Checklist

Personal information (new clients) -

- Prior year income tax return
- Name, address, social security number or tax ID number and date of birth for yourself, spouse and dependents

Dependent information -

- Childcare records (including name, address and tax ID number of the provider)
- Form 8332 showing custodial parent is releasing right to claim a child, if applicable

Income/loss information -

- Wages, unemployment and/or tips
- Interest and/or dividend income
- State/local income tax refunded
- Social security income
- Pension/annuity/IRA income
- Income from sales of stock or other property; acquisition dates and records of your cost basis in property sold if not reported on 1099-B
- K-1's for partnerships, S-corps, estates and trusts
- Gambling/lottery winnings and losses
- Hobby income and expenses
- Alimony income/payments for agreements executed before 12/31/18 (or later for NY tax return)
- Rental income, expenses and rental asset information (cost, date placed in service) for depreciation
- Self-employment, expenses and business-use asset information (cost, date placed in service) for depreciation; office in home information, if applicable
- Foreign income
- Foreign Bank Accounts/Foreign Investments

Expense and deduction information -

- Dependent care costs (do not include expenses paid through FSA)
- 1098-T from educational institution; qualified educational expenses & scholarship or fellowship information
- 1098-E if you paid student loan interest
- Medical/dental expenses paid
- Mortgage/home equity loan interest/mortgage insurance
- Employment related expenses (for NY tax return)
- Tax return preparation expenses (for NY tax return)
- Investment/advisory fees (for NY return)
- Real estate taxes
- Charitable contributions cash/non-cash
- Purchase qualifying for residential renewable energy credit (solar, wind, geothermal and fuel cell)
- IRA contributions/retirement contributions
- Home purchase/moving expenses (for NY tax return)
- Estimated tax payments to federal and state government and dates paid