Tax Preparation Checklist

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Here is a list of documents and information to start gathering in preparation for our meeting

- Last year's income tax return if you are a new client
- Name, address, Social Security number and Date of Birth for yourself, spouse and dependents
- Dependent Care Costs & Provider, Name, Address, Tax ID
- W2s for Wages and/or Unemployment forms
- 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, Investment Income
- Rental Income & Expenses
- Self Employment Income/Tips & Expenses
- Foreign Income
- Education/Tuition Costs/Materials Purchased
- Medical/Dental Expenses
- Mortgage/Home Equity Loan Interest/Mortgage Insurance
- Real Estate & Property Taxes
- Estimated Tax Payments to the IRS and State and Dates Paid
- Charitable Contributions Cash/Non-Cash
- Purchase qualifying for Residential Energy Credit
- IRA Contributions/Retirement Contributions
- Any documents from the IRS

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