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## Tax Appointment Checklist

- Last year's Federal and State tax returns
- Voided Check for Direct Deposit of Refund
- Social Security Cards (s) or a copy for: you, your spouse and, all dependents
- Income/Wage statements: W-2's, 1099's, Alimony received or paid, Commissions received statement, Brokerage account year-end statements, Stock options sale papers, Rental property income and expenses, Partnership, S Corp, trusts, or estate yearly statements and K-1 Forms, Pension or retirement income statements, Social security income yearly statement, Unemployment income yearly statement, State income tax refund statement, Lottery winnings (and lottery losses, if you have winnings)
- Donation receipts
- IRA contributions
- Child care expenses and provider information
- Medical expenses
- State taxes paid
- Un-reimbursed employment-related expenses
- Job-related educational expenses
- Casualty or theft losses
- Foreign taxes paid
- Mortgage interest year-end statement
- Home equity year-end statement
- Property tax information
- If you sold your home, purchase and home improvement information
- Income and expense reports
- Mileage logs for autos
- Receipts for business assets purchased
- Tuition and education fees
- Student loan information
- Grants and scholarship information

### **If applicable:**

1. Death certificate for taxpayer or spouse.
2. Official date of marriage, separation or divorce mm/dd/year.
3. Marital settlement agreement and final decree.

**Note:** Dependent children must have a Social Security number. If not yet obtained, final completion of your return will be delayed pending issuance.