TAX APPOINTMENT CHECKLIST

Personal information –

Birth or Adoption of a child- copy of social security card & birth certificate
Banking information for Direct Deposit or if changed bank during the year

Income Documents (If applicable)

W-2 for any jobs
Unemployment form 1099-G
Self-Employment income (**Must complete and sign Business Worksheet or submit Profit & Loss Statement from an in house accounting system**) – Worksheet or P & L must be sent back 1 week prior to appointment or appointment **WILL BE CANCELED**
Lottery or gambling winnings (Form W-2G, *ALSO BRING WIN/LOSS STATEMENTS TO SHOW ANY LOSSES*)
Interest and Dividend statements
Form 1099-B for Broker transactions-don't forget any App based ones (such as Robinhood, Acorn, Weeble and Coinbase etc....)
If you only have a crypto wallet that will not issue a 1099B, please be aware you are able to export crypto transactions to Form 8949 which will be required at your appointment
Retirement plan distribution (1099-R)
Social Security benefits (Form 1099-SSA)
Alimony Income (divorce decree signed after 1/1/19)
Rental Income (Must complete and sign our worksheet)
Cancellation of Debt (bring 1099-C issued)
State/Local income tax refund

Dependents-if applicable

Dependent care costs – name, address, tax ID or social security number **credit cannot be taken on return** without supporting documentation listing providers identification

Deduction information required

Mortgage interest form (1098) Be aware that if you had your mortgage refinanced or your mortgage was sold during the year to another company you will have more than 1 1098
Home equity interest form (if used for home improvement/home purchase only)
Real Estate taxes paid
Medical/Dental
Education/Tuition (Form 1098-T)
Charitable Contributions (client needs to keep receipts)
Student loan interest (Form 1098-E)

Miscellaneous

IRA contributions
Health Insurance Coverage (Form 1095-A if purchased through the marketplace)