

Tax Appointment Checklist

- **Personal information -**
 - The last two years of income tax returns if you are a new client.
 - Name, address, social security number and date of birth for yourself, spouse and dependents.
 - Dependent provider, name, address, federal tax number or S.S.N. for taxpayers with children under the age of 13 and in after school care or daycare.
 - Banking information if direct deposit or direct debit is required.
 - Proof of health insurance for 2019 if your insurance was issue from the HealthCare MarketPlace. – This would be health insurance form 1095-A. You will receive a form 1095-A if you are insured through the HealthCare MarketPlace. Even though beginning 1-1-2019 the law is now in effect that it is not mandatory to report proof of health insurance or receive a monetary penalty, if you utilized HCMP financial assistance with health insurance, it still must be processed through your income tax return.
 - Your IP PIN that was sent to you in December by the Internal Revenue Service if you have been a Victim of

identity theft in the past or if you participated in the pilot program at any point in the past.

- If you are a homeowner, I will need the 1098 mortgage interest statement or figures from the statement and your property tax bill. I need the actual tax bill, not the proposed statement that they send in August. If you cannot find your mortgage information you can call the company that holds your mortgage and ask for the information over the phone. This will be sufficient. You will ask them for all information on the 1098 Mortgage Interest Statement. Also, any information on a second mortgage such as a HELOC. If you cannot find your tax bill, you can obtain it by going to your county's property tax website and print the bill there. I need it to determine the ad valorem taxes and non-ad valorem assessments.

○ **Income Data Required -**

- Wages and/or Unemployment = W-2s or 1099G
- Interest and/or Dividend Income = 1099 Int /1099 Div.
- Stock or Bond Sales = 1099B
- State/Local Income Tax Refund = 1099G
- Social Security or Disability Income
- Pension/Annuity Withdraws, RMDs = 1099R
- 1120S/Partnership/Trust/Estate Income = K-1
- Gambling/Lottery Winnings/Prizes/Bonus = W-2G or 1099M
- Alimony Income = Only for divorce settlements prior to 12-31-2018
- Rental Income
- Self-Employment Income

- Tips
- Foreign Source Income
- Inheritance
- All other income of any kind!

○ **Expense Data Required -**

- Dependent Care Costs
- Education/Tuition Costs/Materials Purchased
- Medical/Dental
- Mortgage/Home Equity Loan Interest/Mortgage Insurance
- Gambling/Lottery Expenses
- Real Estate Taxes
- Estimated Tax Payments to Federal and State Government Agencies and Dates Paid
- Home Property Taxes
- Charitable Contributions Cash/Non-Cash
- Purchase qualifying for Solar Residential Energy Credit
- IRA Contributions/Retirement Contributions
- Home Purchase = HUD 1 closing statement
- Moving Expenses only if you are Military or Government
- A paper copy of your business expenses and /or mileage log if you are self employed

