**2020 TAX APPOINTMENT CHECKLIST**

PERSONAL INFORMATION:

* Last years tax return if you are a new client
* Name, address, social security number and date of birth for yourself, spouse and dependents
* Child/Dependent Care Provider name, address, tax ID number
* Banking information for direct deposit or direct payment of taxes owed – routing #, account #, account type- checking or saving
* Amount of stimulus received - first and second payment both if received

INCOME DATA REQUIRED:

* W-2 for wages, 1099 for unemployment
* Interest and/or dividend income
* State/Local income tax refund if itemized previous year
* Social Assistance Income
* Pension, 401, IRA, Annuity Income – 1099 forms
* Stock or Bond sale statements
* Contract/Partnership/Trust/Estate Income statement
* Gambling/Lottery Winnings and Losses also Prizes/Bonus
* Alimony Income
* Rental Income
* Self Employment Business Income or Tips
* Foreign Income
* Health Savings Account disbursement statements

EXPENSE DATA REQUIRED

* Dependent Care Costs
* Education/Tuition Costs, (form 1098-T) Supplies Purchased
* Medical/Dental out of pocket costs not covered by insurance or paid for with before tax funds (IF ITEMIZING)
* Mortgage Loan Interest statement, Real Estate Taxes, Property Taxes (if itemizing)
* Gambling/Lottery Expenses
* Estimated Taxes paid to Federal and State Goverments
* Charitable giving statements/receipts (if itemizing)
* IRA Contribution Statements
* Total Expenses paid for with Health Savings Account