Check the list below to know what you should bring with you for Tax Appointment:

Tax Appointment Checklist

- **Personal information** -
  - Last year's income tax if you are a new client
  - Name, address, Social Security number and Date of Birth for yourself, spouse and dependents
  - Dependent Provider, Name, Address, Tax ID and S.S.N.
  - Banking information if Direct Deposit Required

- **Income Data Required** -
  - Wages and/or Unemployment
  - 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
  - Rental Income
  - Self-Employment/Tips
  - Foreign Income
- **Expense Data Required** -
  - Dependent Care Costs
  - Education/Tuition Costs/Materials Purchased
  - Medical/Dental
  - Mortgage/Home Equity Loan Interest/Mortgage Insurance

- Employment Related Expenses
- Gambling/Lottery Expenses
- Tax Return Preparation Expenses
- Investment Expenses
- Real Estate Taxes
- Estimated Tax Payments to Federal and State Government and Dates Paid
- Home Property Taxes
- Charitable Contributions Cash/Non-Cash
- Purchase qualifying for Residential Energy Credit
- IRA Contributions/Retirement Contributions
- Home Purchase