

Tax Appointment Checklist

- **Personal Information –**
 - Last year's Federal and State income tax return if you are a new client
 - Name, Address, Social Security Number and Date of Birth for yourself, spouse, and dependents
 - Banking Information for Direct Deposit is required
 - Driver's License or copy of
 - Identity Protection PIN, if one has been issued to you, your spouse, or your dependent by the IRS
 - Estimated Tax Payments to Federal/ State Governments and Dates Paid

- **Income/ Investments/ Retirement/ Adjustments–**
 - Wages (Form W-2) and/or Unemployment (Form 1099-G)
 - Interest and/or Dividend income
 - State/ Local income tax refunded
 - Social Security benefits received
 - Pension/ IRA/ Annuity/ Stock or Bond Sales
 - Partnership/ Trust/ Estate Income (K-1)
 - Gambling/ Lottery Winnings and Losses/ Prizes
 - Rental Income
 - Self-Employment (Includes 1099-NEC and 1099-MISC)
 - Foreign Income
 - Extra Tip Income Reporting
 - Transactions involving cryptocurrency (must have cost basis)

- **Expenses and Deductions--**

- Dependent Care Provider, Name, Address, Tax ID and S.S.N.
- Form 1098-T needed for Education/ Tuition Costs/ Materials Purchased
- Student Loan Interest paid (Form 1098-E)
- Mortgage Interest/ Home Equity Loan Interest
- Real Estate Taxes
- Purchase qualifying for Residential Energy Credit (solar, wind, geothermal and fuel-cell technology)
- Charitable Contributions Cash/ Non-Cash
- Total miles driven for charitable or medical purposes
- Amounts paid out-of-pocket for healthcare, insurance, co-pays, doctors, dentist, and hospitals
- Form 1095-A if you enrolled in a health insurance plan through the NJ Marketplace
- Classroom Expenses for Educators in grades K-12
- IRA Contributions/ Retirement Contributions
- Home Purchase/ Points
- Moving Expenses for Military Personnel Only
- Closing statements for any real estate purchased or sold
- Records of any property lost or damaged due to natural disaster
- Record of expenses associated with rental income and/or self-employment
- Business-use asset information for depreciation (cost, date placed in service, etc.)
- Investment Expenses