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# TAX APPOINTMENT CHECKLIST

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## 1. ALL TAXPAYERS

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- Forms W-2, W-2G (Gambling), 1099-R (Retirement), 1099-G (Unemployment) & 1099-SSA (Social Sec)
- Forms 1099-INT & 1099-DIV
- 1098-E for Student Loans
- 1098 Mortgage Interest Form, Real Estate Tax Payments, Closing Stmt if bought or sold, 1099-S if rec'd
- Form 1095-A if you had coverage through Health Insurance Marketplace (no longer need 1095-B or C)
- 1099-SA for anyone using a Health Savings Account
- For new parents, social security number for the new baby
- Charitable Contributions both cash and in goods and clothing
- Medical Expenses (if over 7.5% of your total income)
- Total paid for daycare and provider's name, address and tax id
- Amount of Alimony paid, ex-spouses social security number or Alimony received, date of divorce
- Contributions made to Personal (non-work) IRAs or 529 Education Savings Plans
- Bank Account Routing and Account Numbers (listed on bottom of check)
- New York State (or out-of-state) Driver's License/Photo ID for both Taxpayer & Spouse
- 1098-T Tuition Statement & College Billing Statement if you or your dependents attended College
- 1099-B forms or statements from Banks and Brokerages
- K-1 Forms from owners of Partnerships, S Corporations or beneficiaries of Trusts

## 2. SELF-EMPLOYED OR INDEPENDENT CONTRACTORS

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- 1099-Misc, 1099-NEC, K-1, 1099-K, QuickBooks P&L and Balance Sheet Reports or Spreadsheet (or enclosed worksheet)
- Tabulation and categorization of Business Related expenses such as: Advertising, Subcontractors, Insurance, Legal Fees, Office Supplies, Supplies, Major equipment purchases, Office Rent, Telephone, Credit Card Fees, Auto Mileage, Travel, Client Meals, Tools, Licenses and any other costs you believe related to the business
- Office in Home Information, including square footage of home or apartment and square footage of dedicated office space and home expenses such as Mortgage or Rent, Insurance, Taxes, Maintenance and Utilities
- Any estimated tax payments made to prepay this year's taxes

## 3. OWNERS OF RENTAL INCOME PROPERTY

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- Income received from Tenants and expenses both related to the whole house and specifically to rental (use software, spreadsheet or enclosed worksheet) Expenses to include: Advertising, Maintenance, Management fees, Insurance, Legal Fees, Mortgage Interest, Property Taxes, Repairs, Supplies, Utilities and any other related costs
- Original Purchase Price of Home and major improvements and costs of furnishings and appliances
- Copy of prior year tax return is required (unless I already have it)