Tax Appointment Checklist

1. *New clients: Copy of most recently filed income tax return (2 years preferred)*
2. All income source documents (W2's, 1099's, interest, dividends, stock sales, unemployment, social security, retirement, etc.)
3. Totals or documents for all of the standard expenses
   a. DMV fees
   b. Charitable donations - cash and checks
   c. Charitable donations - goods to organizations (Goodwill, etc.)
   d. Mortgage interest
   e. Property taxes
   f. Tax preparation fee
   g. Total of all sales taxes paid during the year
4. Any form 1095 related to health insurance (whether you paid for it or not)
5. Totals of all job specific work-related expenses (car, postage, printing, publications, phone bill, union dues, etc.)
6. Any IRA contributions for the year (Roth, traditional, non-deductible, SEP)
7. *If you have a dependent*, bring their birthday and social security number
8. *If you paid for college or had student loans*, for yourself or anyone else, bring total amount paid for each person
9. *If you had ANY real estate transactions* during the year (purchase, sale, refinance, short sale, or foreclosure), bring closing statements for the transactions
10. *If you sold a property during the year,* bring closing statement from when the property was originally purchased
11. *If you have a rental property,* bring all income and expenses totaled by category
12. *If you sold any stocks:* bring purchase information (date, amount spent)
13. *If you own your own business,* bring all income and expenses totaled by category
14. *If you pay for childcare,* bring name, address, tax ID #, phone number, and amount paid for the year
15. *If you purchased a new vehicle,* bring the contract for the purchase
16. *If you paid estimated taxes,* bring a list of payment dates and amounts to each government entity (IRS, CA, etc.)