Client Interview Checklist

Before your appointment, please review the following list and bring any and all documentation that will assist in preparing your tax returns.

PERSONAL INFORMATION AND DOCUMENTATION

- Name
- Social Security Card or Individual Taxpayer Identification Number (ITIN)
- Valid Driver's License or State Identification Card
- All Dependent's Social Security Numbers and Dates of Birth
- Bank Account Information for Electronic Refund Deposit with Routing Number
- Last Year's Federal and State Tax Returns

SOURCES OF INCOME

- Wage Statements (Form W-2)
- Interest Income (Form 1099-INT or substitute)
- Dividend Income (Form 1099-DIV or substitute)
- Self-Employment Income (Form 1099-MISC)
- Sales Commissions (Form 1099-MISC)
- Social Security Income (Form SSA-1099)
- Unemployment Income (Form1099-G)
- Pension Retirement Income (Form1099-R)
- IRA or 401(k) Distribution Income (Form1099-R)
- State Income Tax Refund (Form 1099-G)
- Gambling or Lottery Winnings (Form W-2G)
- Miscellaneous Income (Form 1099-MISC)
- Alimony Income
- Rental Income
- Sale of Business Assets
- Sale of Personal Residence

- Stock and Bond Sales (Form 1099-B)
- Income From Partnerships, Corporations, Trusts, Estates (Schedule K-1)

DEDUCTIONS AND ADJUSTMENTS TO INCOME

- Estimated Income Taxes already paid (Form 1040-ES Payment Vouchers)
- Traditional IRA Contributions
- Mortgage Loan Interest (Form 1098)
- Medical Expenses (including Dental and Eye Care)
- Charitable Contributions (Cash and Non-Cash)
- Child Care Expenses
- Educator Expenses
- Job-Related Educational Expenses
- Student Loan Interest (Form 1098-E)
- Tuition and Education Fees (Form 1098-T)
- Lottery and Gambling Losses
- Alimony Expense
- Theft and Casualty Losses
- Foreign Taxes
- State Income Tax
- State and Local Sales Tax
- Real Estate or Personal Property Taxes

TAX CREDITS

- Dependent Day Care / Provider (Address and Employer Identification Number (EIN)
- Adoption Expense Information for the Adoption Credit