Tax Appointment Checklist

* Social Security Number & Date of Birth [Self]
* Social Security Number & Date of Birth [Spouse] (if applicable)
* Social Security Number & Date of Birth [Dependents] (if applicable)
* Daycare information, Daycare Expenses and EIN for taxes
* Name of School, City of School, Grade for current tax year (K-12) Registration fees & cost of supplies
* College information, form 1098-T, Expenses needed to graduate (College)
* Bright Start/Bright Directions Contributions
* W2s for you (and/or your spouse)
* W2Gs (gambling wins)
* 1099-Rs (this is pensions and retirement account withdrawals)
* 1099-MISC (any miscellaneous income)
* 100099-NEC (non-employee compensation)
* 1099-K (generally self-employed income or income from a selling platform)
* 1099-C (Cancellation of debit)
* End of Year brokerage Statement (with cost basis)
* 1099 Consolidated (These are for brokerage accounts or investment accounts with stocks)
* 1099B (sales of stock)
* 1099DIV (dividends)
* 1099INT (interest)
* IRA and/or ROTH IRA contributions made independently
* Bank information (routing number, account number, bank name)
* Alimony paid or Received (divorce date or Separation agreement)
* Mortgage Interest Statement 1098
* Property Tax info and PIN
* Medical Expenses (totals) (see separate worksheet)
* Charitable contributions divided between monetary and goods
* Gambling Losses
* Business records for self-employed income and expenses
* Social Security Statements SSA-1099
* Railroad Retirement forms
* Rental Property Records Income and Expenses
* Estimated payments made to the IRS and/or State
* Educator Expenses (teachers) & PEL Number
* Sales Tax on Large purchases
* HUD (for sale or refi of you home)
* IP PIN (Identity Protection Pin if applicable)
* Past 2 years Tax Returns (new clients only)
* REPEAT CLIENTS ONLY: If you are picking up or dropping off tax documents for any person besides yourself, we need a signed letter from the individual
* Payment of $89.00 we accept Cash, Check, Zelle, and Debit and Credit