

Please bring the following information to your tax appointment:

- **New Clients, bring tax returns for the prior 3 years**
- **Blank Check for direct deposit of any refunds**
- **If you purchased health insurance through a state or federal exchange, bring form 1095-A**
- **If new Client or License is renewed or new since last year- Bring Drivers License for you and your spouse**
- W-2's, 1098's, & 1099's (unemployment, interest, dividends, social security, pension, gambling, prizes, etc)
- Any other income such as cancellation of debt, bartering, jury duty, and scholarships - even if no 1099
- If you received any tips not reported to your employer or not included in your W-2, provide amount
- If New Client - Social Security Cards and dates of birth for yourself, spouse & other dependents
- If Returning Client - Social Security Cards and date of birth for any new dependents / spouse
- **Closing Disclosure Statement for any home or rental property purchased, refinanced, or sold**
- K-1's for partnerships, S-Corps, estates and trusts (also distributions from & transfers to foreign trust)
- For sales of stocks/securities (1099-B) or other property, the following is needed: 1) property description 2) purchase date 3) sale date 4) purchase price 5) selling price 6) improvements and 7) expense of sale
- Details (see above item) on any stocks or securities you own that became worthless during the year
- Details on any stock options granted to you by your employer or any stock options you exercised
- Detail of charitable contributions - cash (Church or Synagogue, United Way, etc.) and non cash
- Mortgage interest statements, real estate taxes, personal property taxes
- Interest payments on a boat or recreational vehicle with a bedroom, kitchen and bath
- Detail of estimated tax payments made, if any
- Medical expenses if you will itemize deductions and you incurred significant expenses
- Long Term Care Insurance Premiums paid
- Detail of payments you made to nursing homes for a possible Nursing Home Assessment Credit
- Child care expenses/cost of caring for a handicapped individual so you could work, attend school, or look for a job - amount paid, name, address, and tax ID # of provider
- Tuition Payments (1098-T), **student account activity**, student loan interest, and 529 plan contributions
- Contributions to an IRA, Roth IRA, or self employed retirement plan you made or plan to make for tax year
- **For purchases of vehicles, motorcycles and motor homes, provide sales tax paid for possible deduction**
- If you or your spouse are age 70 ½ or older, are you taking required retirement plan distributions?
- Contributions/withdrawals from HSA's (Health Savings Accounts) or MSA (Archer Medical Savings Acct)
- Details of gifts totaling more than \$15,000 to any individual during the year
- Solar Energy Home Improvements – Bring all information you have – invoices etc.
- UN-reimbursed job expenses: Uniforms, dues, travel, supplies, etc. (See #3 & 28 in business checklist)
- Job seeking expenses in same field - travel, food, employment agency fees, resume cost, etc.
- Moving expenses for a new job - provide details
- Adoption Expenses
- If you rent an apartment, the amount of rent and any utilities included (if your income is under \$18,001)
- Alimony Paid - Social Security Number of Recipient, Alimony Received
- Non-custodial parent claiming an exemption(s) for your child(ren), provide form 8332 if applicable
- Detail of dependent children's unearned income if over \$1,050 (interest, dividends, capital gains, etc.)
- Please inform tax preparer if you or your spouse is legally blind or disabled
- If you purchased a plug in vehicle or alternative fuel source vehicle, please provide details
- If you are a teacher, please provide details of out-of-pocket classroom expenses
- **Details of any financial accounts (including retirement) maintained by a foreign (non-US) financial institution**
- Financial interest in or signature or other authority over a foreign financial account, please provide details
- If you employ an individual to perform household services (baby-sitting, cleaning, etc.) provide details
- If any changes were made to federal or state returns (amended or audit) for prior years, provide details
- Provide cost of items purchased for which NY State sales tax was not paid but should have been
- National Guard or Reservist who travel over 100 miles away from home and stay overnight, provide details
- Provide details for any auto accident, fire, theft, natural disaster, etc. for a possible casualty loss deduction
- If you have any other income not listed above do not assume it is not taxable. Please bring the relevant information to your tax appointment so a determination can be made

Please see the Business and Rental Property checklist if you have business or rental activity to report