

SAL'S TAX PREPARERS INC

Tax Appointment Checklist

- **Personal information -**
 - **NEW CLIENTS**: Last year income tax RETURN.
 - Name, address, Social Security number and Date of Birth for yourself, spouse and dependents
 - Dependent Provider, Name, Address, Tax ID and S.S.N.
 - Banking information: *ROUTING CODE AND BANK ACCOUNT NUMBER* (if Direct Deposit Required)
- **Income Data Required -**
 - Wages and/or Unemployment (*W2'S AND 1099G*)
 - Interest and/or Dividend Income (*1099 INT AND 1099 DIV*)
 - State/Local income tax refunded
 - Social Assistance Income (*SSA 1099*)
 - Pension/Annuity/Stock or Bond Sales (*1099'S*)
 - Contract/Partnership/Trust/Estate Income
 - Gambling/Lottery Winnings (*1099G*) and Losses/Prizes/Bonus
 - Alimony Income
 - Rental Income (*1099 MISC*)
 - Self-Employment/Tips (*1099 MISC*)
 - Foreign Income

- **Expense Data Required -**
 - Dependent Care Costs (*name, address & fed. ID #*)
 - Education/Tuition Costs/Materials Purchased (*1099 T*)
 - Medical/Dental
 - Mortgage/Home Equity Loan Interest/Mortgage Insurance (*1098*)
 - Employment Related Expenses
 - Gambling/Lottery Expenses
 - Tax Return Preparation Expenses
 - Investment Expenses
 - Real Estate Taxes
 - Estimated Tax Payments to Federal and State Government and Dates Paid
 - Home Property Taxes
 - Charitable Contributions Cash/Non-Cash
 - Purchase qualifying for Residential Energy Credit
 - IRA Contributions/Retirement Contributions
 - Home Purchase/Moving Expenses
 - Rental Property Expenses : (example: Mortgage int., real estate taxes, repairs, capital improvements, utilities, maintenance fees, etc...)
 - Self -Employment Business Expenses: (example: Advertising, Car and Truck exp., Commission Fees, Insurance, Interest exp., Legal and Professional Fees, Office Expenses, Rental exp., Repairs and Maintenance, Supplies Taxes and Licenses, Travel, Meals, and Entertainment , Utilities, etc....)

Important Note: Please keep good records of all expenses.

