**2017 Tax Appointment Checklist**

* + **Personal information** -
* Last years income tax if you are a new client
* 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 if Direct Deposit Required
  + **Income Data Required** -
* Wages and/or Unemployment
* Interest and/or Dividend Income
* State/Local income tax refunded
* Social Assistance Income
* Pension/Annuity/Stock or Bond Sales
* Contract/Partnership/Trust/Estate Income
* Gambling/Lottery Winnings and Losses/Prizes/Bonus
* Alimony Income
* Self Employment/Tips
* Foreign Income
* Sales of stock Form 1099 B ( due to you form investment firms on Feb 15th)
* Rental Property --- See Below
  + **Expense Data Required** -
* Dependent Care Costs
* Education/Tuition Costs/Materials Purchased Form 1098 T as well as the financial statement itemizing and listing what they billed and what amounts you paid with dates accordingly.
* Medical/Dental out of pocket – not amounts paid pretax.
* Mortgage/Home Equity Loan Interest/Mortgage Insurance
* 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
* Personal Property Taxes (such as vehicles, boats, RVs)
* Charitable Contributions Cash/Non-Cash For non-cash please bring the charitable organization’s receipt displaying date of donation, the FMV you ascribed to the items donated, and a general list of items donated. Please be advised that you need to have an itemized listing of ewhat you donated in your files. The burden of proof for the value you gave is on you. Pictures help as well. Please ask me for a Charitable Donation How to Hand out to better assist you.
* Purchase qualifying for Residential Energy Credit
* IRA Contributions/Retirement Contributions
* Home Purchase/Moving Expenses
* **Rental Properties**
* Rental Income
* Property Management Statement
* Homeowner’s repairs -- Repairs need to be identified by event, date, and cost.
* Home Owner’s Insurance Paid
* Mortgage Form 1098
* Real Estate Taxes Paid if not on Form 1098 Mortg.
* Mileage to and from to care for rental repairs and other matters related to rental property
* Other expenses related to rental such as legal, postage, etc.

Some of the items listed will not apply or will be limited beginning 2018. We’ll discuss this if time allows during the tax interview or set up another appointment.