

2020 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
 - Daycare Provider, Name, Address, Tax ID or S.S.N.
 - Banking information if Direct Deposit Requested
 - Proof of residency if your child qualifies you for the Earned Income Tax Credit

- **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
 - Rental Income
 - Self Employment/Tips
 - Foreign Income

Expense Data Required -

- Dependent Care Costs
- Education/Tuition Costs/Materials Purchased
- Student loan interest
- Medical/Dental
- 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, State and Local Government and Dates Paid
- Home Property Taxes
- Charitable Contributions Cash/Non-Cash
- IRA Contributions/Retirement Contributions
- Moving Expenses for military
- 529 Plan Contributions
- Residential Energy Credit – windows, doors, insulation, heat pumps, furnaces, hot water heaters, air conditioning, certain metal and asphalt roofs, biomass stoves, solar or geothermal systems

Other information:

*Stimulus Recovery Check amount

*Covid-19 business and rental related loans and advances

*Covid-19 related illness for self-employed, providing care to others or covid-19 related childcare

