2022 Tax Appointment Checklist

- **Personal information** -
    - Update any changes in your name, marital status, address or phone number
    - New dependent – Full name, birthdate and social security number
    - 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
    - Social Security/unemployment
    - Contract/Partnership/Trust/Estate Income
    - Gambling/Lottery Winnings and Losses/Prizes/Bonus
    - Alimony Income
    - Rental Income
    - Self Employment/Tips/1099-K
    - Foreign Income

- Cryptocurrency – explanation in newsletter and Drop Off Sheet

Expense Data Required -

- Dependent Care Costs
- Education/Tuition Costs/Materials Purchased
- Student loan interest
- Medical/Dental – if itemizing on Schedule A
- Mortgage/Home Equity Loan Interest/Mortgage Insurance – if itemizing on Schedule A
- Employment Related Expenses
- Gambling/Lottery Expenses
- Investment Expenses
- Real Estate Taxes – if itemizing on Schedule A
- Estimated Tax Payments to Federal, State and Local Government and Dates Paid
- Home Property Taxes – for the Property Tax Rebate or itemizing on Schedule A
- Charitable Contributions Cash/Non-Cash
- Traditional and Roth IRA Contributions
- Moving Expenses for military
- 529 Plan Contributions
- Residential Energy Credit – see details on newsletter or Drop Off Sheet
- Electric vehicle purchase

Other information:

- 1095-A – if health insurance through Pennie.com