**Tax Appointment Checklist**

**Forms specific to new clients:**

[ ]  Last 1-3 years prior tax returns if possible.

[ ]  Social Security numbers and date of birth for each filer.

[ ]  Home address, email addresses and cell phone numbers for each filer.

[ ]  Dependents/children require Social Security Cards and date of birth.

[ ]  State refund amount for prior year. If no prior tax return is present.

**Forms for ALL clients returning and new:**

[ ]  Banking information for all Direct payments or debits. (name of institution, routing & account numbers)

[ ]  Wage (W2) income.

[ ]  Unemployment (1099-G) if applicable

[ ]  Retirement, Pension income or RMD’s (1099-R) if applicable.

[ ]  Social Security (1099) if applicable.

[ ]  Door dash, Lyft or Uber income 1099-NEC

[ ]  Interest or Dividend from bank.

[ ]  Cashed Municipal or Savings Bond.

[ ]  Year end retirement packet with 1099-DIV and 1099-INT and stock sales or trades.

[ ]  Gambling, lottery, bingo, or other prizes won. *Bring a logbook of losses/$ spent incurred for session losses.*

[ ]  K-1 from a Trust, Partnership, Corporate Returns or Estate if applicable.

[ ]  Income from Tips if applicable.

[ ]  Self-employment income along with expense and profit and loss statements if applicable.

[ ]  Rental income along with expenses if applicable.

[ ]  Foreign Income if applicable.

[ ]  MN onetime tax credit (Gov Walz Money) 1099

[ ]  Alimony paid or received and the date of divorce.

[ ]  1099-K from Venmo, PayPal, Stripe, Square, Google Pay, Cash app, Apple Pay ETC.

[ ]  1099-Misc form

[ ]  1095-A for Marketplace Insurance (Obama Care)

[ ]  Income from another state.

[ ]  Information if you paid or received a gift for over $17,000

**Additional Adjustments, Deductions and Credits (if applicable):**

[ ]  Dependent daycare costs.

[ ]  Education, tuition, and materials.

[ ]  Donations made to a 529 plan.

[ ]  Charitable Contributions cash and non-cash donations.

[ ]  Medical expenses are only required if you had an extreme amount spent over $13,000 single 27,000 for married.

[ ]  Mortgage interest 1098-T or Renters Credit CRP

[ ]  Real Estate taxes if you own your home.

[ ]  Education Providers list of personal out of pocket spending for classroom.

[ ]  Business in home information for non-W2 work if you work from home and receive a 1099-Misc

[ ]  Total square footage of home, square footage of designated office space. Utilities, internet, phone advertising, asset list.

[ ]  Estimated tax payments made for both Federal and State and if payment made at time of extensions and the dates paid, if applicable.

[ ]  Charitable Contribution cash and non-cash these are deductible for state.

[ ]  IRA Contributions made out of pocket not on W2

[ ]  Qualifying Residential energy credits for new Doors, Windows Geothermal etc.

[ ]  Qualifying Electric Vehicle purchase.

[ ]  Home sale or purchase closing documents and moving expenses if applicable.