**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.