

Please bring the following information to your tax appointment:

- **New Clients bring tax returns for the prior 3 years.**
- **Blank Check for direct deposit of any refunds.**
- If you purchased health insurance through a state or federal exchange, bring form 1095-A.
- **If new Client or License is renewed or new since last year- Bring Drivers License for you and your spouse.**
- W-2's, 1098's, & 1099's (unemployment, interest, dividends, social security, pension, gambling, prizes, etc.).
- Any other income such as work in a foreign country, bartering, jury duty, scholarships, etc. - even if no tax document.
- Details of any canceled debts, property repossessions and foreclosures, or bankruptcies.
- If you received any tips not reported to your employer or not included in your W-2, provide amount.
- **If New Client - Social Security Cards and dates of birth for yourself, spouse & other dependents.**
- If Returning Client - Social Security Cards and date of birth for any new dependents / spouse.
- **Closing Disclosure Statement for any home or rental property purchased, refinanced, or sold.**
- K-1's for partnerships, S-Corps, estates, and trusts. Details of any ownership in foreign corporations or partnerships.
- If you received distributions from, or were you the grantor of, or a transferor to, a foreign trust – provide details.
- For sales of stocks/securities (1099-B) or other property, the following is needed: 1) property description 2) purchase date 3) sale date 4) purchase price 5) selling price 6) improvements and 7) expense of sale.
- Details (see above item) on any stocks or securities you own that became worthless during the year.
- Details on any stock options granted to you by your employer or any stock options you exercised.
- Detail of charitable contributions - cash and noncash (Church or Synagogue, United Way, etc.).
- Mortgage interest statements, real estate taxes **-even if not itemizing** for possible NY Credit, personal property taxes.
- Interest payments on a boat or recreational vehicle with a bedroom, kitchen, and bath.
- Detail of estimated tax payments made, if any.
- Medical expenses if you will itemize deductions and you incurred significant expenses.
- Long Term Care Insurance Premiums paid.
- Detail of payments you made to nursing homes for a potential Nursing Home Assessment Credit.
- Childcare expenses/cost of caring for a dependent child under 13 or cost of caring for a disabled individual or spouse so you could work, attend school, or look for a job - amount paid, name, address, and tax ID # of provider.
- Tuition Payments (1098-T), student account activity, student loan interest, and 529 plan contributions.
- Contributions to an IRA, Roth IRA, or self-employed retirement plans you made or plan to make for year.
- For purchases of vehicles, motorcycles, and motor homes, provide sales tax paid for possible deduction.
- **If you or your spouse are age 73 or older, are you taking required retirement plan minimum distributions?**
- Contributions/withdrawals from Health Savings Accounts (HSA).
- Details of gifts totaling more than \$17,000 to any individual during the year.
- **Energy Home Improvements** Including Exterior Windows and Doors, Furnaces, Air Conditioners, Insulation, Solar, Wind and Geothermal, etc. Bring all the information you have – invoices etc.
- UN-reimbursed job expenses: Uniforms, dues, travel, supplies, etc. (See #3 & #28 in business checklist)
- Job seeking expenses in same field - travel, food, employment agency fees, resume cost, etc.
- Moving expenses for a new job - provide details.
- Adoption Expenses – or adoption of special needs child without regard to out of pocket expenses.
- If you received, sold, exchanged, gifted, or otherwise disposed of any digital asset (**virtual**) – provide details.
- If you rent an apartment, the amount of rent and any utilities included (if your income is under \$18,001).
- Alimony Paid/Received - Social Security # of payee or recipient and date of original divorce or separation.
- Non-custodial parent claiming an exemption(s) for your child(ren), provide form 8332 if applicable.
- Detail of dependent children's unearned income if over \$1,250 (interest, dividends, capital gains, etc.).
- Inform tax preparer if you or your spouse is legally blind or disabled.
- If you purchased an electric, plug-in electric, or alternative fuel source vehicle, bring purchase invoice.
- If you are a grade K-12 teacher, provide details of out-of-pocket classroom expenses.
- **Details of any financial accounts (including retirement) maintained by a foreign (non-US) financial institution.**
- Financial interest in or signature or other authority over a foreign financial account, stocks, etc. provide details.
- If you employ an individual to perform household services (baby-sitting, caretaker, cleaning, etc.) provide details.
- If any changes were made to federal or state returns (amended or audit) for prior years, provide details.
- Provide cost of items purchased for which NY State sales tax was not paid but should have been.
- National Guard or Reservist who travel over 100 miles away from home and stay overnight, provide details.
- Provide details for any auto accident, fire, theft, natural disaster, etc. for a possible casualty loss deduction.
- If you have any other income not listed above, bring the relevant information to your tax appointment.

**Please see the Business and Rental Property checklist if you have business or rental activity to report.**