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 and 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 $18,000 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 $1,300 (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.