

Tax Appointment Checklist

1. Personal & Banking Information

- Prior Year Tax Return (Essential for new clients)
- Full Name & Address
- SSN & Date of Birth (For self, spouse, and dependents)
- Dependent Provider Data (Name, Address, Tax ID, and SSN)
- Banking Details (Routing and Account numbers for Direct Deposit)

2. Income Data

- Wages and/or Unemployment
- Interest and/or Dividend Income
- State/Local Income Tax Refunds
- Social Assistance Income
- Pension, Annuity, or Stock/Bond Sales
- Contract, Partnership, Trust, or Estate Income
- Gambling/Lottery Winnings, Prizes, and Bonuses
- Alimony, Rental, or Foreign Income
- Self-Employment Income and Tips

3. Expense & Deduction Data

- Dependent Care and Education/Tuition Costs
- Medical and Dental Expenses
- Mortgage Interest, Home Equity Interest, and Mortgage Insurance
- Employment-Related and Investment Expenses
- Gambling/Lottery Losses (up to winnings)
- Real Estate and Home Property Taxes
- Estimated Tax Payments (Include amounts and dates paid)
- Charitable Contributions (Both Cash and Non-Cash)
- IRA or Other Retirement Contributions
- Residential Energy Credit Qualifying Purchases
- Home Purchase or Moving Expenses

4. Preparer Notes & Appointments

Appointment Date/Time:

Notes/Questions for Preparer:

Please complete this checklist and bring all required documents to your tax appointment.

Profit Wise Solutions LLC | (206) 999-9291 | <https://profitwisesolutions.com>