



Name: _____

HOW WOULD YOU LIKE YOUR FINAL RETURN?

- ☐ Pick Up
- ☐ Email _____
- ☐ Credit/Debit Card (MUST BE KEPT ON FILE)*: _____



Information Checklist

Exp: _____ CVV: _____ Zip Code: _____

Address	
Phone Number	
Date of Birth	
Occupation/ Profession	
Change in Martial Status	
Did you sell a property? Did you do a 1031 Exchange?	
Do you have health Insurance through the Affordable Care Act? Did you receive a 1095A?	
Did you receive any Unemployment?	
Account & Routing Number? (Updated)	Acct #: Routing#:
Monthly Rent	
Children: Any new additions? /Childcare cost for the year	
Did you withdraw any money from an IRA/401K?	
Did anyone attend college in the last year?	
Any 1099-Misc/ 1099-K income?	
Have you recently retired?	
Canceled Debt?	
Do you collect Social Security?	
Any gambling winnings?	
Any out of pocket medical expenses?	

WHAT TO BRING TO YOUR TAX INTERVIEW

- ☐ Wage Statements/ W-2
- ☐ Dependent's Social Security numbers and dates of birth
- ☐ Last year's tax returns
- ☐ Pension, retirement income/ 1099R
- ☐ IRA contributions & distributions/ 1099R
- ☐ Interest and dividend income/ 1099-INT/ 1099-DIV
- ☐ Mortgage or home equity loan interest paid/ 1098
- ☐ Real estate and personal property taxes
- ☐ Sales of stocks or bonds/ 1099-B
- ☐ Self-employed business income & expenses (commissions)/ 1099-MISC/
1099-K
- ☐ Educational expenses/1099-E/1098-T/ 1099-Q ☐
- Child care expenses and provider information
- ☐ Lottery or gambling winnings & losses/ W-2G
- ☐ State refund amount/ 1099-G
- ☐ Social Security & Unemployment income/ SSA-1099/1099-G
- ☐ Income & expenses from rentals
- ☐ Income from partnerships, S Corporations, trusts & estates/ Schedule K-1
- ☐ Alimony paid or received
- ☐ Record of purchase or sale of residence
- ☐ Medical and dental expenses
- ☐ Estimated taxes, state, local & foreign taxes paid
- ☐ Cash and non-cash charitable donations
- ☐ Health Savings Account/ 1099-SA
- ☐ Non-reimbursed employment- related expenses (Not applicable for any
year after 2017)
- ☐ Affordable Care Act/ 1095A