

PREMIER Financial Tax & Accounting Services

Tax Appointment Checklist

○ Personal information

- Last year's income tax if you are a new client
- Name, address, Social Security number and Date of Birth for yourself, spouse, and dependents
- Dependent Provider, Name, Address, Tax ID and S.S.N.
- Banking information if Direct Deposit Required

○ Income Data Required -

- Wages -W2 | Unemployment-1099G
- Interest 1099INT | Dividend Income – 1099DIV
- State | Local income tax refunded – 1099G
- Social Assistance Income – SSA-1099
- Pension | Annuity | Stock or Bond Sales
- Contract | Partnership | Trust | Estate Income
- Gambling | Lottery Winnings and Losses/Prizes/Bonus
- Alimony Income – Depends
- Rental Income
- Self-Employment | Tips 1099-NEC | 1099-MISC
- Foreign Income

○ Expense Data Required -

- Dependent Care Expenses
- Education | Tuition Costs/Materials Purchased
- Medical/Dental
- **Mortgage | Home Equity Loan Interest | Mortgage Insurance**
- **Business Expenses**
- Employment Related Expenses
- Gambling | Lottery Expenses
- Tax Return Preparation Expenses
- Investment Expenses
- Real Estate Taxes
- Estimated Tax Payments to Federal and State Government and Dates Paid
- Property Taxes
- Charitable Contributions Cash | Non-Cash Contribution
- Purchase qualifying for Residential Energy Credit
- IRA Contributions | Retirement Contributions
- Home Purchase | Moving Expenses