

Quick Tax Professionals
"The Professional Tax People"

(678) 310-0525 Office (678) 310-0572 Fax

Tax Appointment Checklist

Please bring the following information with you to your tax appointment. All documents needed for accurate filing of your tax return.

Personal Information

- Last year's Income Tax Return if you are a new client
- Name, Address, Social Security Card Number and Date of Birth for you, your spouse and dependents
- Child Care Provider, Name, Address, Tax ID Number and/or Social Security Number
- Banking information if Direct Deposit Requested

Income Data Required

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

Expense Data Required

- Child Care Costs
- Education/Tuition Costs/Materials Purchased
- Medical/Dental Expenses
- Mortgage/Home Equity Loan Interest/Mortgage Insurance
- 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
- Home Property Taxes
- Charitable Contributions Cash/Non-Cash
- IRA Contributions/Retirement Contributions
- New Home Purchase Expenses
- Moving Expenses (Military Only)