ANDERAL TAX & FINANCIAL

Tax Appointment Checklist

Personal Information

- Last year's income tax return, if you are a new client
- The following for yourself, spouse, and dependents:
  - Name
  - Address
  - Date of Birth
  - Social Security number
- Your Banking information if Direct Deposit is requested
  - Routing #
  - Account #

Income Information

- W-2's
- 1099's
- Interest
- Dividends
- State/Local income tax refunded
- Social Assistance Income
- Pension/Annuity/Stock or Bond Sales
- Contract/Partnership/Trust/Estate Income
- Gambling/Lottery Winnings and Losses/Prizes/Bonus
- Alimony Income
- Rental Income
- Self Employment/Tips
- Foreign Income

Expense Information

- Dependent Care Costs
- Education/Tuition Costs/Materials Purchased
- Medical/Dental
- 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
- Purchase qualifying for Residential Energy Credit
- IRA Contributions/Retirement Contributions
- Home Purchase/Moving Expenses

"*Thank you for your business !*"