



BROWN & HOWARD
TAX SERVICE

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Tax Appointment Checklist

Personal Information

- Last year's income tax return **New clients only (including depreciation schedules and carryover worksheets)
- Government issued photo ID's for you and your spouse
- SSN/ITIN number for you and your spouse
- Identity Protection PIN (if applicable)
- Banking information if Direct Deposit Required
- Estimated payments (1099-ES, direct pay confirmations, or copy of mailed checks)

Dependent Information

- Dates of Birth, SSN/ITIN numbers
- Proof of residency (school record, medical bill, etc.)
- Dependent care provider, name, address, tax ID or S.S.N, and amount paid
- Dependent's income (if applicable)

Income Information

- W2's for yourself and your spouse
- Interest and/or Dividend Income (1099-INT, 1099- DIV)
- Retirement/Pension/Annuity (1099-R)
- Social Security Income (1099-SSA or 1099-RRB)
- Stock or bond sales (1099-B)
- Capital gains/losses on asset sales (purchase price & date, sale price & date for transactions no 1099-B is issued including crypto currency sales)
- Income from partnerships, s-corps, estates, or trusts (K-1)
- Income from rents or royalties (1099-MISC)
- Self-Employment Income (Cash sales, 1099-K, 1099-NEC)
- Other income such as: farm income, state/local income tax refunds (1099-G), gambling winnings and losses (W2-G), Sale of real estate (1099-S), Long-term care reimbursements (1099-LTC) Jury duty pay, foreign income, etc.

Other Forms

- Marketplace Insurance (1095-A)
- HSA distributions & contributions (1099-SA/form 5498-SA)
- Retirement contributions (Form 5498)
- 529 plan distributions (1099-Q)

Self- Employment Expenses

- Records of business expenses (totaled by category for the year)
- Asset purchase information (purchase cost & date)
- Asset sale information (purchase price & date, sale price & date)
- Mileage records (totaled for the year)
- Business use of home information (sq footage of home, sq footage of office and applicable expenses)

Rental Expenses

- Basis for depreciation (cost basis plus improvements)
- Asset purchase information (purchase cost & date)
- Asset sale information (purchase price & date, sale price & date)
- Records of rental expenses (totaled by category for the year)
- Mileage records (totaled for the year)

Farm Expenses

- Records of farm expenses (totaled by category for the year)
- Asset purchase information (purchase cost & date)
- Asset sale information (purchase price & date, sale price & date)
- Mileage records (totaled for the year)

Schedule A Deductions

- Mortgage interest (1098)
- Property taxes and/or local taxes paid
- Charitable donation receipts (Cash and property totaled separately for the year)
- Medical expenses (including insurance premiums if not through your W2 job)
- Charitable and/or medical mileage records (totaled separately for the year)

Other Deductions/Credits

- Education credit (1098-T) and documents for qualified educational expenses such as books, required software, computer, etc. (totaled for the year)
- Student loan interest paid (1098-E)
- Out of pocket educator expenses (totaled for the year and limited to \$300)
- Receipts for energy efficiency credits (windows, solar panels, EV charging stations, etc)
- Receipts for qualifying electric vehicle purchase (year, make, model, VIN, date)

This does not serve as an all-inclusive list. Please bring any additional information you may have received or documents that pertain to your tax filing.