BURR BUSINESS SERVICE

Tax Appointment Checklist

Personal Information –

- Copy of last years tax return if you are a new client
- Name, address, social security number and date of birth for yourself, spouse and dependents
- Dependents provider, name, address, tax ID number and social security number
- Banking information if direct deposit is required

Income Data Required –

- Wages (W-2's) and/or unemployment compensation
- 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/Bonuses
- Alimony Income
- Rental Income
- Self Employment/Tips
- Foreign Income

Expense Data Required –

- Dependent Care Costs
- Education/Tuition Costs/Material 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