



Virtual / Drop-off Client Checklist

New Clients Only

Please upload or drop-off copies of:

- Previous year's tax return (Federal & State) (Previous two years preferred)
- Social Security cards (copies ok)
- Driver's licenses (or valid picture ID) (copies ok)

All Clients (New/Returning), please upload/drop-off and provide any additional information:

Personal Data

- Form 8332 for any dependents claimed pursuant to post '85 divorce decree, non-custodial parents ONLY
- Proof of medical insurance: Form 1095-A,B,C
- Copy of Voided Check for direct deposit

Income

- W-2 Forms
- Interest Income: Form 1099-INT & 1099-OID
- Interest from Partnerships, Trusts, S-Corps, Estates & Tax Shelters
- Dividend income: Form 1099-DIV
- State & local income tax refund: Form 1099-G
- Alimony Received
- Proceeds from broker transactions: Form 1099-B
- IRA/Retirement Plan Distributions: Form 1099-R
- Pensions & Annuities: Form 1099-R
- K-1: Income from Partnerships, Trusts, etc.
- Unemployment Compensation: Form 1099-G
- Social Security Benefits received
- Income from Jury Duty, legal awards, settlements
- Gambling/lottery winnings/losses, prize money
- Scholarships & fellowships
- 1099-C: Cancellation of debt (credit card, mortgage)

Real Estate

- Mortgage Interest: Form 1098
- Sale of your home: Form 1099-S
- Second mortgage interest paid
- Real estate taxes paid (all property)
- 1099-A: Abandonment of property
- Final closing statement (HUD) if new property

Deduction Documents

- State/local income tax (estimated tax payments)
- IRA, Keogh, retirement contributions
- Medical, dental, long term care expenses
- Medical insurance premiums
- Casualty or theft losses
- Personal property tax (vehicles)
- Charitable contributions (money/goods)
- Education expenses: Form 1098-T or 1098-E

If You Have a Business (Self-Employment)

- All business income/expenses itemized
- Mileage log
- Equipment purchased / sold
- 1099 Forms
- Home office square footage

If You Have Rental Property

- Addresses of all properties
- List # of days rented and # personal use
- Rental income/expenses itemized
- Improvements made