Tax Appointment Checklist

Schedule your appointment early in February.

Use your prior year return as a guide in assembling and arranging your tax information for the current year. Completeness of data cannot be over emphasized. We can prepare an organizer workbook customized for your information that may assist you in the assembling of your tax information. If you would like us to send you an organizer, please contact us.

Obtain and bring mandatory social security numbers for all dependents born during the year.

Review your prior year depreciation schedule for additions and deletions to assist us in minimizing your income and property taxes. Please bring us your property tax forms as soon as possible. The filing deadline is April 1.

Items that you should bring to us include:

- All Forms W-2 and Forms 1099 covering credits and payments received. Be sure correct social security numbers are assigned to accounts where payors provide Forms 1099 (e.g. savings, brokerage houses, cooperatives, et cetera)
- Social Security Form SSA-1099
- All Forms 1095 for health insurance coverage
- Mutual fund statements showing all activity for the year
- Statements, notices, letters of advice, Forms 1099 PATR, et cetera, covering retains and patronage dividends of your cooperative
- List of your charitable contribution with written statements from charities for contributions of $250 or more
- List of your personal deductions, including property tax, DMV fees, mortgage interest, medical, dependent care, et cetera expenses
- All invoices, contracts, escrow papers and other documents covering sales or purchases of equipment and other property. (If you purchased real property during the year, bring the current property tax bill)
- List of all federal and state income tax and estimated tax payments made during the year by date, payee, purpose and amount