

Pre-Appointment Checklist

		Completed
1.	W2's for Income	_____
2.	1099s for Interest and Dividends	_____
3.	Total Medical Expenditures	_____
	Doctors	
	Dentists	
	Medical Insurance	
4.	Total Tax Receipts	_____
	Ad Valorem (Vehicles) Tax	
	Real Estate Tax for Residence, 2 nd Home or any other property	
5.	Total Interest Paid	_____
	Mortgage Interest	
	Investment Interest	
	Bank Statement Interest	
6.	Sale of Stock	_____
	Date of Purchase	
	Purchase Price	
	Date of Sale	
	Selling Price	
7.	Total Charitable Contributions	_____
	Cash	
	Clothing, Furniture, etc. - Value	
8.	Tax Preparation Fee for Previous Year	_____
9.	IRA Fees – Maintenance	_____
10.	Safe Deposit Box Rental	_____
11.	ALL Business/Employee/Rental Expenses	_____
	Mileage	
	Meals	
	Out of Town Travel	
	Publications	
	Phone Charges, including mobile phone	
	Office Supplies, etc.	
12.	Total Child Care Paid	_____
	Name, Address & SSN or EIN of Provider	
13.	Real Estate Transactions	_____
	Purchase of New House	
	Sale of Old House	
	Settlement & Closing Statements	
14.	K1s – Partnership or Sub – S	_____
15.	Moving Expenses if more than 50 miles from previous address	_____
16.	State Income Tax Refund from Previous Year	_____
17.	Job Search Related Expenses	_____