RCM TAX EXPERT & CONSULTANT, INC.

Tax Appointment Checklist

NOTE: This list is not all-inclusive.

Personal information –

- ☐ Last two years income tax if you are a new client
- ☐ Name, address, Social Security number and Date of Birth for yourself, your spouse, and dependents
- ☐ Dependent Care Provider, Name, Address, Tax ID or S.S.N.
- ☐ Banking information if Direct Deposit Required (voided check or bank printout showing routing and account number)

Income Data Required –

- ☐ Wages (W-2's), and/or Unemployment (1099-G)
- ☐ Interest/Dividend Income
- ☐ Sales of Stock (Statement of Realized Gains/Losses)
- ☐ State/Local income tax refunded
- ☐ Social Security Income
- ☐ Other Social Assistance Income
- ☐ Pension/Annuity/Stock or Bond Sales
- ☐ Self-Employment Income (1099-NEC, 1099-Misc)
- ☐ K-1 from S-Corps, Partnerships, Trust/Estate
- ☐ Gambling/Lottery Winnings and Losses/Prizes/Bonus
- ☐ Alimony Income
- ☐ Rental Income
- ☐ Foreign Income
- ☐ Tips received

Expense Data Required –

- ☐ Dependent Care Costs
- ☐ Education/Tuition Costs/Materials Purchased (Forms 1098-T)
- ☐ Medical/Dental
- ☐ Mortgage/Home Equity Loan Interest/Mortgage Insurance (Form 1098)
- ☐ Employment Related Expenses
- ☐ Gambling/Lottery Expenses
- ☐ Investment Expenses
- ☐ Property Taxes
- ☐ Estimated Tax Payments to Federal and State Government and Dates Paid
- ☐ Charitable Contributions Cash/Non-Cash
- ☐ Purchase qualifying for Residential Energy Credit
- ☐ IRA Contributions/Retirement Contributions
- ☐ Home Purchase/Sale Closing Documents

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