



ACCOUNTING, TAX & BUSINESS SOLUTIONS, LLLP  
8310 Office Park Drive  
Douglasville, GA 30134-6935

## Tax Appointment Checklist

- *Do you have any interest in a foreign account or did you trade, buy, or sell any virtual currency?*
- *Foreign Income greater than a cumulative \$10,000, throughout the year, need to file an FBAR Return.*

### Personal Information –

- Last year's income tax if you are a new client.
- Name, address, Social Security Number (SSN) and Date of Birth (DoB) for yourself, spouse, and dependents (*not required if you are a returning client*)
- Dependent Care Provider, Name, Address, Tax ID and SSN
- Banking Information if Direct Deposit is Selected

### Income Data Required –

- Wages and/or Unemployment
- Interest and/or Dividend Income
- State/Local Income Tax Refunded
- Social Security Income
- Pension/Annuity/Stock or Bond Sales
- Corporate/Trust/Estate Income
- Gambling/Lottery Winnings and Losses/Prizes/Bonus
- Alimony Income
- Rental Income
- Self-Employment Income/Tipp Income
- Foreign Income



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**Expense Data Required –**

- Dependent Care Costs
- Education/Tuition Costs/Materials Purchased (College or University Students)
- Medical/Dental
- Mortgage/Home Equity Loan Interest/Mortgage Insurance
- Real Estate/Home Property Taxes
- Gambling/Lottery Losses (if you had winnings to offset the amount won)
- Tax Return Preparation Expenses
- 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
- If you are in the Military or National Guard and received orders, your moving expenses are deductible.