PREMIER Financial Tax & Accounting Services

Tax Checklist

- **Personal information**
  - Last year's income tax if you are a new client
  - Name, address, Social Security number and Date of Birth for yourself, spouse, and dependents
  - Dependent Provider, Name, Address, Tax ID and S.S.N.
  - Banking information if Direct Deposit Required

- **Income Data Required -**
  - Wages -W2 |Unemployment-1099G
  - Interest 1099INT |Dividend Income – 1099DIV
  - State/Local income tax refunded – 1099G
  - Social Assistance Income – SSA-1099
  - Pension/Annuity/Stock or Bond Sales
  - Contract/Partnership/Trust/Estate Income
  - Gambling/Lottery Winnings and Losses/Prizes/Bonus
  - Alimony Income
  - Rental Income
  - Self-Employment |Tips 1099-NEC | 1099-MISC
  - Foreign Income

- **Expense Data Required -**
  - Dependent Care Expenses
  - Education/Tuition Costs/Materials Purchased
  - Medical/Dental
  - **Mortgage| Home Equity Loan Interest| Mortgage Insurance**
  - **Business Expenses**
  - Employment Related Expenses
  - Gambling/Lottery Expenses
  - Tax Return Preparation Expenses
  - Investment Expenses
  - Real Estate Taxes
  - Estimated Tax Payments to Federal and State Government and Dates Paid
  - Home Property Taxes
  - Charitable Contributions Cash/Non-Cash
  - Purchase qualifying for Residential Energy Credit
  - IRA Contributions/Retirement Contributions
  - Home Purchase/Moving Expenses