QUIKTAX SERVICES
INCOME TAX & PAYROLL & BOOKKEEPING

New Client Checklist

Prior to your tax appointment, please gather the following:

Personal Information

- ☐ Previous year's tax return
- ☐ Social Security Card, ID Card (Driver's License) & D.O.B.- for Taxpayer/Spouse & Dependents
- ☐ Banking information (Bank, Routing #, & Account#) for Direct Deposit

Income Data (Any that Apply)

- ☐ Wages/Unemployment (W2, 1099, etc.)
- ☐ Interest/Dividend Income (1099int, 1098, etc.)
- ☐ State/Local income tax refunded
- ☐ Social Security Income
- ☐ Pension/Annuity/Stock or Bond Sales
- ☐ Corporate/Partnership/Estate Income
- ☐ Gambling/Lottery Winnings and Losses/Prizes/Bonus
- ☐ Alimony Income
- ☐ Rental Income
- ☐ Self-Employment/Tips
- ☐ Foreign Income

Expense Data (Any that Apply)

- ☐ Health Insurance (1095A, B, or C)
- ☐ Dependent Care Costs
  - Provider Name, Address, Tax ID/S.S.N.
- ☐ Employment Related Expenses
- ☐ Education/Tuition/Materials Purchased
- ☐ Medical/Dental Expenses
- ☐ Gambling/Lottery Expenses
- ☐ Investment Expenses
- ☐ Mortgage/Home Equity Loan Interest/Mortgage Insurance
- ☐ Tax Return Preparation Expenses
- ☐ Real Estate/Property Taxes
- ☐ Estimated Tax Payments to Federal & State Government and Dates Paid
- ☐ Charitable Contributions Cash/Non-Cash
- ☐ Purchase qualifying for Residential Energy Credit
- ☐ IRA/Retirement Contributions
- ☐ Home Purchase/Moving Expense