

A & A TAX SERVICE

Tax & Accounting Solutions for Individuals & Small Businesses

Tax Appointment Checklist

Personal Information –

- Last year's income tax return if you are a new client
- 2024 Tax Return Questionnaire (see website www.aataxservice.net for Questionnaire)
- Name, Address, Social Security number and Date of Birth for yourself, spouse, and dependents
- Dependent Care Provider, Name, Address, Tax ID or S.S.N.
- Banking information if Direct Deposit/Direct Debit Requested
- Driver's License (front and back) for yourself and spouse

Income Data –

- Wages (W-2 forms)
- Unemployment (1099-G) - Download from NYS Website prior to appointment
- Miscellaneous Income (1099-MISC and/or 1099-NEC)
- Interest (1099-INT) and/or Dividend Income (1099-DIV)
- State/Local income tax refund
- Social Security Income (SSA-1099)
- IRA, Pension and or Annuity distributions (1099-R)
- Cancellation of Debt (1099-C)
- Brokerage statements for sale of Stocks and/or Bonds
- S Corp/Partnership/Trust/Estate Income (Form K-1)
- Gambling/Lottery Winnings/Prizes/Bonus (W-2G)
- Distributions from 529 plans (1099-Q)
- Distributions from Health Savings Account (1099-SA and 5498-SA)
- Rental Property Income
- Self-Employment/Sole Proprietor Income
- Closing statements for the sale and/or purchase of residential property
- Virtual Currency (report showing sales proceeds and cost basis)

Expense Data –

- Childcare Costs
- College Education/Tuition Costs (1098-T) /Materials Purchased /Housing Costs
- Medical/Dental Expenses, including health insurance and long-term care contracts
- Mortgage/Home Equity Loan Interest/Mortgage Insurance (1098)
- Employment Related Expenses
- Gambling/Lottery Losses
- Investment Expenses
- Real Estate Taxes
- Estimated Tax Payments to Federal and State Government and Dates Paid
- Self-Employment/Sole Proprietor Expenses (Schedule C)
- Charitable Contributions (Cash/Non-Cash)
- Purchases qualifying for Residential Energy Credit & Solar
- IRA Contributions/Retirement Contributions/Required Minimum Distribution
- Home Purchase/Moving Expenses
- Rental property expenses
- Premium Tax Credit – Form 1095-A
- Student Loan Forgiveness

If mailing or dropping off, please send copies of documents, not originals (if possible).

If emailing, faxing, or uploading to the Client Portal, please make sure the documents are clear and legible.