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**Tax Appointment Checklist**

**Personal Information**

* Last year’s income tax return 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 social security number
* Banking information if direct deposit required
* Drivers license number, issue date, expiration date and state of issuance
* Phone number

**Income Data Required**

* Wages and/or Unemployment
* Interest and/or dividend income
* State/local income tax refunded
* Social assistance income
* 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
* Foreign Income

**Expense Data Required**

* Dependent care costs
* Education/tuition costs/materials purchased
* Medical/dental
* Mortgage/home equity loan interest/mortgage insurance
* 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

**If you would like an organizer please contact our office.**