
APPOINTMENT CHECKLIST

This sheet provides a list of the documents and supporting materials you should bring to your appointment. This list is extensive and included many items the average taxpayer won't have or need. If you don't know if something applies to you or have any questions prior to your appointment, contact us at help@prioritytaxsolutions.com.

- Completed Interview Questionnaire
- Social Security Card(s)
- Driver's License(s)
- Dependents' Social Security Numbers & Dates of Birth
- Last Year's Federal and State Tax Returns
- Wage Statements - Form W-2
- Pension or Retirement Income - Form 1099-R
- Interest and Dividend Income - Form 1099-INT/Form 1099-DIV
- State Income Tax Refund Amount - Form 1099-G
- Social Security Income - Form SSA-1099
- Unemployment Income - Form 1099-G
- Commissions Received/Paid
- Information on sales of Stocks or Bonds - Form 1099-B
- Self-Employed Business/Farm Income & Expenses - Form 1099-MISC
- Lottery or Gambling Winnings - Form W-2G
- Lottery or Gambling Losses
- Income and Expenses From Rentals
- Income from Partnerships, S Corporations, Trusts, and Estates - Schedule K-1
- IRA Contributions
- Alimony Paid or Received
- Child Care Expenses & Provider Information
- Medical, Eye Care, and Dental Expenses
- Cash and Noncash Charitable Donations
- Record of Purchase or Sale of Residence
- Mortgage or Home Equity Loan Interest Paid - Form 1098
- Real Estate and Personal Property Taxes Paid
- State or Local Sales Taxes Paid
- Unreimbursed Employment-Related Expenses
- Job-Related Educational Expenses
- Tuition and Education Fees - Form 1098-T
- Student Loan Interest - Form 1098-E
- Casualty or Theft Losses
- Estimated Taxes
- Foreign Taxes Paid