Landing Tax Group

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New Client Pre-Appointment Checklist

To help you prepare for your tax appointment, we've created a checklist to help you know what information to provide and what forms to bring. We ask that all new clients drop off their tax documents prior to their appointment.

Personal information - We will collect this information when you drop off your tax documents.

- ☐ Your social security number or tax ID number
- ☐ Your spouse's full name, social security number or tax ID number, and date of birth
- ☐ Your dependent's full name, social security number or tax ID number, and date of birth
- ☐ Routing and account numbers to receive your refund by direct deposit or pay your balance due if you choose

Forms and documentation to bring - All items may not be applicable to you, so please read the list carefully to determine what you need to bring.

- ☐ A copy of the previous year's tax return
- ☐ Identity Protection PIN, if one has been issued to you, your spouse, or your dependent by the IRS

Employed

- ☐ Forms W-2

Unemployed

- ☐ Unemployment (1099-G)

Self-Employed

- ☐ Form 1099-NEC, Schedules K-1
- ☐ Records of all expenses — check registers or credit card statements, and receipts
- ☐ Business-use asset information (cost, date placed in service, etc.) for depreciation
- ☐ Office in home information
- ☐ Record of estimated tax payments made (Form 1040–ES)

Rental Income

- ☐ Records of income and expenses

- ☐ Rental asset information (cost, date placed in service, etc.) for depreciation
- ☐ Record of estimated tax payments made (Form 1040–ES)

Retirement Income

- ☐ Pension/IRA/annuity income (1099-R)
- ☐ Social security/RRB income (SSA-1099, RRB-1099)

Savings & Investments or Dividends

- ☐ Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)
- ☐ Income from sales of stock or other property (1099-B, 1099-S)
- ☐ Health Savings Account and long-term care reimbursements (1099-SA or 1099-LTC)
- ☐ Record of estimated tax payments made (Form 1040–ES)
- ☐ Transactions involving cryptocurrency (Virtual currency)

Other Income & Losses

- ☐ Gambling income (W-2G or records showing income, as well as expense records)
- ☐ Jury duty records
- ☐ Prizes and awards
- ☐ Trust income
- ☐ 1099-MISC (royalty income, etc.)
- ☐ Any other 1099s received

Health Insurance

- ☐ Form 1099-HC
- ☐ Form 1095-A if you enrolled in an insurance plan through the Marketplace (Exchange)

If the total from these deductions is more than the standard deduction, also bring:

Standard deductions –
Single or married filing separately: $14,600
Single over 65 years old: $16,550
Married filing jointly: $29,200
Married filing jointly over 65 years old: $32,300
Head of household: $21,900

Home Ownership

- ☐ Forms 1098 or other mortgage interest statements
- ☐ Real estate and personal property tax records
- ☐ Receipts for energy-saving home improvements (e.g., solar panels, solar water heater)

- ☐ All other 1098 series forms

Charitable Donations

- ☐ Cash amounts donated to houses of worship, schools, other charitable organizations
- ☐ Records of non-cash charitable donations
- ☐ Amounts of miles driven for charitable or medical purposes

Medical Expenses

- ☐ Amounts paid for healthcare, insurance, and to doctors, dentists, and hospitals

Childcare Expenses

- ☐ Fees paid to a licensed day care center or family day care for care of an infant or preschooler (including the provider's tax ID number)
- ☐ Expenses paid through a dependent care flexible spending account at work

Educational Expenses

- ☐ Forms 1098-T from educational institutions
- ☐ Receipts that itemize qualified educational expenses
- ☐ Records of any scholarships or fellowships you received
- ☐ Form 1098-E if you paid student loan interest

State and Local Taxes

- ☐ Amount of state and local income or sales tax paid (other than wage withholding)
- ☐ Invoice showing amount of vehicle sales tax paid and / or personal property tax on vehicles