

The Tax Law Office of Luis E. Vasquez

Checklist for Tax Interview

Personal Information for Each Family Member:

- Name
- Date of Birth
- Driver's License or a Photo Identification Card
- Social Security Card /ITIN/ATIN
- Last Year's Tax Return

Healthcare Information:

- Proof of Health Insurance for entire household
- Form 1095-A if received healthcare from a Federal or State Marketplace
- Bring 1095-B and 1095-C forms

Direct Deposit Information

- Please bring a voided check or have the routing and account numbers for your bank account if you would like your tax return direct deposited into your account.

Income and Tax Information:

- W-2's
- Interest (1099-INT or substitute)
- Dividend Slips (1099-DIV or substitute)
- Miscellaneous Income (1099-MISC)
- Stock Sales (1099-B or Broker Statement)
- Pension Income (1099-R)
- Self-Employment Income and Expenses
- Sale of a Personal Residence
- Rental Income and Expenses
- Gambling or Lottery Winnings
- State Income Tax Refund

- Estimated Taxes Paid
- Social Security or Railroad Retirement
- IRA or 401(k) Distribution
- Unemployment Compensation

Deductions/Adjustments:

- Medical Expenses
- Real Estate or Personal Property Taxes
- Mortgage Interest
- Charitable Contributions
- Employee Business Expenses
- Gambling Losses
- Moving Expenses
- Traditional IRA Contributions
- Higher Education Expenses
- Educator Expenses
- Student Loan Interest

Tax Credits:

- Child Care Provider/Address and Employer Identification Number (EIN) or Social Security Number (SSN)
- Adoption Expenses
- Retirement Savings Contributions
- Bring 1098-T Education Tuition Statement

Small Business Tax Information:

- 1099-K Payment Card and Third-Party Network Transactions
- Self-Employment Income and Expenses
- Business Profit and Loss Statement
- Business Balance Sheet
- Sales of any Business Assets