



INNOVATIVE FINANCIAL

I N C O R P O R A T E D

TAX APPOINTMENT CHECKLIST

INCOME:

- W2(S)
- RECORD OF INCOME 1099(S)
- SOCIAL SECURITY INCOME (SSA 1099)
- UNEMPLOYMENT INCOME
- GAMBLING INCOME
- INVESTMENT STATEMENTS
- BANK INTEREST
- K1(S)

ITEMIZED DEDUCTIONS:

- MEDICAL EXPENSES
 - (EXCEEDING 7.5% AGI)
- PROPERTY TAX STATEMENTS
- VEHICLE LICENSE FEE(S)
- HOME & EQUITY MORTGAGE INTEREST
- CHARITABLE CONTRIBUTIONS
- GAMBLING LOSSES

ADDITIONAL INCOME:

- HSA DISTRIBUTIONS (1099-SA)
- MARKETPLACE INSURANCE (1095A)
- OVERTIME PAY DOCUMENTATION
- SCHEDULE C BUSINESS
 - INCOME AND EXPENSES
- SCHEDULE E RENTAL
 - INCOME AND EXPENSES

ADDITIONAL DEDUCTIONS:

- NEW VEHICLE INTEREST (VIN required)
- EDUCATION – TUITION COST (1098T)
- RENTERS – MONTHLY PAYMENT
 - LANDLORD NAME & ADDRESS
- CHILD CARE – PAYMENTS
 - PROVIDER NAME, ADDRESS, EIN/SSN
- PURCHASE / SALE / REFINANCE OF RESIDENCE (Closing Documents)

TAX RETURN INFORMATION:

- FEDERAL & STATE ESTIMATES PAID
- DIRECT DEPOSIT INFORMATION – ROUTING & ACCOUNT NUMBER *(If not on file)*
- DEPENDENT(S) – Full Name, Date of Birth, Social Security Number *(If not on file)*
- IDENTITY PROTECTION (IP) PIN – IF REQUIRED