AISHA'S MOBILE NOTARY & TAX PROS
Your Signature is Everything

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Tax Appointment Checklist

Personal Information:

__Last 3 years of income tax returns (for new clients)
__Social Security Number for taxpayer, spouse, and dependents
__Birth dates for taxpayer, spouse, and dependents
__Current address
__Current phone number
__Social Security Cards for taxpayer, spouse, and dependents
__State issued Identification for taxpayer and spouse
__Birth certificates for dependents
__Current bank account and routing numbers if wanting direct deposit
__Proof of health insurance

Income Data Required:

__Wages and/or unemployment Interest and/or Dividend Income State/Local income tax refund 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:

Mortgage/Home Equity Loan Interest/Mortgage Insurance

Employment Related Expenses
Gambling/Lottery Expenses
Tax Return Preparation Expenses
Investment Expenses
Real Estate Taxes
Estimated Tax Payment to Federal and State Government and dates paid
Home Property Taxes
Charitable Contributions Cash/No-cash
Purchase qualifying for Residential Energy Credit
IRA Contributions/Retirement Contributions
Home Purchase/Moving Expenses
Dependent Care Costs
Education/Tuition Costs/Materials Purchased
Medical/Dental