Cartwright
AND ASSOCIATES

Tax Appointment Checklist

Personal Information

- ☐ Last year's income tax return (if you are a new client)
- ☐ Name, address, Social Security number, and date of birth for yourself, spouse, and dependents
- ☐ Dependent care provider name, address, Tax ID, and Social Security number
- ☐ Banking information (if direct deposit is required)
- ☐ Copy of driver's license for taxpayer and spouse (for e-filing)
- ☐ Copy of insurance card if IRS Form 1095 has not yet been received
- ☐ Completed Cartwright and Associates Intake Form
  (Three-page form for new clients; one-page form for existing clients)

Income Data Required

- ☐ Wages and/or unemployment income
- ☐ Overtime or tips (provide the last paystub of the year)
- ☐ Interest and/or dividend income
- ☐ State or local income tax refunds
- ☐ Social assistance income
- ☐ Pension, annuity, stock, or bond sales
- ☐ Contract, partnership, trust, or estate income
- ☐ Gambling or lottery winnings and losses, prizes, or bonuses
- ☐ Alimony income
- ☐ Rental income
- ☐ Self-employment income or tips
- ☐ Foreign income

Once you have gathered all of your documents, please visit our website and click Client Login. If you do not yet have an online portal account, please feel free to call our office and we will send you an invitation to the Client Hub.