



www.andreacpa.com

(201) 777-1575

Tax Appointment Checklist

Personal information -

- ☐ Last year's income tax if you are a new client
- ☐ Name, address, Social Security number and Date of Birth for yourself, spouse and dependents
- ☐ Dependent Provider, Name, Address, Tax ID and S.S.N.
- ☐ Banking information if Direct Deposit Required
- ☐ Copy of Driver's License for Taxpayer and Spouse to E-File
- ☐ Copy of Insurance Card if you have not yet received your IRS Form 1095

Complete the AAC CPA Tax Intake Form

Income Data Required -

Wages and/or Unemployment
Interest and/or Dividend Income
State/Local income tax refunded
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

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