Jean A. Cordasco

Your Go To Tax Gal | CPA

Tax Checklist

Personal Information

❐ Last years income tax (New Clients Only)

❐ Name, address, Social Security number and DOB for all individuals in the household.

❐ Dependent Provider, Name, Address, Tax ID and S.S.N.

❐ Banking information if Direct Deposit Required (Routing & Account Number, Bank Name, Checking or Savings account, etc.)

Income Data Required

❐ Wages and/or Unemployment

❐ Interest and/or Dividend Income

❐ State/Local Income Tax

❐ 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

❐ Dependent Care Costs

❐ Education/Tuition Costs/Materials Purchased

❐ Medical/Dental

❐ Mortgage/Home Equity Loan Interest/Mortgage Insurance

❐ Employment Related Expenses

❐ Gambling/Lottery Expenses

❐ Tax Return Preparation Expenses

❐ Investment Expenses

❐ Real Estate Taxes

❐ Estimated Tax Payments to Federal and State Government and Dates Paid

❐ Charitable Contributions Cash/Non-Cash

❐ Purchase qualifying for Residential Energy Credit

❐ IRA Contributions/ Retirement Contributions

**Have any questions regarding what is taxable and what is non taxable feel free to give our office a call at (856) 772-4905!*