STRATEGIC FINANCIAL

Tax Appointment Checklist

All NEW clients, please bring or upload a copy of last year's tax return!

Income:

- W-2's ☐
- Pension statements (1099R) ☐
- Unemployment statement (1099G)* ☐
- Social Security ☐
- All other income ☐

Banking/Investments:

- 1099s ☐
- Stock trades (purchase dates & prices)** ☐

Home:

- Mortgage interest statement (1098) ☐
- Property tax bill ☐
- Closing documents for refinance ☐
- Closing documents for purchase or sale ☐

Sales Tax:

- Receipts for large purchases (car, furniture, etc) ☐

☐

New Dependents:

- Social Security Number ☐

Health Insurance:

- Marketplace statement (1095A) ☐
- HSA form (1099SA) ☐

Childcare:

- Provider EIN # and total amount paid ☐

College:

- College tuition (1098T) ☐
- Student loan interest (1098E) ☐
- 529 contributions ☐

* https://applications.labor.ny.gov/IndividualReg/

** For more than 20 trades, please provide an Excel file.

For a list of possible deductions and/or credits, please visit our website:
www.strategicfinancalny.com