

RON'S TAX SERVICE

TAX APPOINTMENT CHECKLIST

- **PERSONAL INFORMATION -**
 - Last years 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

- **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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- **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
 - Home Property Taxes
 - Charitable Contributions Cash/Non-Cash
 - Purchase qualifying for Residential Energy Credit
 - IRA Contributions/Retirement Contributions
 - Home Purchase/Moving Expenses

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DOCUMENTS REQUIRED FOR SUBMISSION OF TAX RETURN

- Social security cards for ALL reported on return (One time only)
- Birth certificates for ALL dependents. (One time only)
- If claiming dependents other than son or daughter, please provide birth certificates showing relationship chain
- School record or medical record for all dependents (Needed every year)

No shot records or medical ID cards accepted

→ **OTHER ITEMS THAT ARE ACCEPTED TO SHOW RESIDENCY** ←

- Rental agreement w/ dependents Listed
- Medical bill with dependents name and address
- Report card with name and address on it
- Bank statement in dependents name with address
- Court documents stating legal custody
(if claiming kids that are not yours)

Thank you for assisting me in complying with the IRS requirements.

Sincerely,
Ron Belcher