





GET'S
*Guaranty Express
 Tax Service*

Tax Appointment Checklist

Document Description	 Document Attached	Note(s)
Personal information -		
Prior year income tax return <i>(new client's only)</i>		
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 Direct Deposit Information Required		
Income Data Required -		
Wages and/or Unemployment		
Interest and/or Dividend Income		
State/Local income tax refunded		
Mileage Log <i>(Written)</i>		
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		
Employer Identification Number		



Expense Data Required -	 Document Attached	Note(s)
Dependent Care Costs (tax form)		
Education/Tuition Costs/Materials Purchased (<i>Form 1098-T</i>)		
Medical/Dental (<i>Form 1095-A</i>)		
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 Statement		
Charitable Contributions Cash/Non-Cash Statement		
Purchase qualifying for Residential Energy Credit		
IRA Contributions/Retirement Contributions		
Home Purchase/Moving Expenses		

