TAXPLUS
TAX + BUSINESS SERVICES

12803 Venice Blvd, Los Angeles Ca 90066 • Tel: 310-398-3231
4340 Genesee Ave #205, San Diego Ca 92117 • Tel: 858-279-1640
Fax: 310-398-5641 • www.taxplus.com

General Client Interview Checklist

Before your appointment, please review the following list and bring all documentation that will assist in preparing your tax returns.

PERSONAL INFORMATION AND DOCUMENTATION

☐	**Taxpayer and Spouse Social Security Card (SSN) or Taxpayer Identification Number (ITIN)**
☐	**Taxpayer and Spouse Valid Driver's License or State Identification Card**
☐	**All Dependent's Social Security Numbers (SSN) and Dates of Birth**
☐	**Bank Account information for Electronic Refund Deposit with Routing Number**
☐	**Last Year's Federal and State Tax Returns**

SOURCES OF INCOME

☐	**Salary and Wages (Form W-2)**
☐	**Investment Income (Form 1099-INT, Form 1099-DIV, Form 1099-B or substitute form)**
☐	**Self-Employment Income (Form 1099-NEC, Sales Receipts, Business Bank Statements…)**
☐	**Unemployment Income (Form 1099-G)**
☐	**Retirement Income (1099-R Form, SSA 1099 Form…)**
☐	**State Income Tax Refund (Form 1099-G)**
☐	**Gambling or Lottery Winnings (Form W-2G)**
☐	**Miscellaneous Income (Form 1099-Misc)**
☐	**Alimony Received (May be taxed depending on when divorce was finalized)**
☐	**Rental Income**
☐	**Sale of Business Assets**
☐	**Sale of Personal Residence**
☐	**Investment Income from Stock and Bond Sales (Form 1099-B)**
☐	**Income from Partnerships, Corporations, Trusts, Estates (Schedule K-1)**
☐	**Other Sources of Income (Crypto, Hobby Income, International…)**

DEDUCTIONS AND ADJUSTMENTS TO INCOME

☐	**Estimated Tax Payments (Form 1040-ES Payment Vouchers)**
☐	**Traditional IRA Contributions**
☐	**Mortgage or Home Equity Loan Interest (Form 1098)**
☐	**Medical Expenses (including Dental and Eye Care)**
☐	**Charitable Contributions (Cash and Non-Cash)**
☐	**Child and Dependent Care Expenses**
☐	**Educator Expenses**
☐	**Job-Related Educational Expenses (State Use Only)**
☐	**Student Loan Interest Paid (Form 1098-E)**
☐	**Tuition and Education Fees (Form 1098-T)**
☐	**Gambling and Lottery Losses (Up to Winnings)**
☐	**Moving Expenses (Military Use Only)**
☐	**Alimony Paid (May be tax deductible depending on when divorce was finalized)**
☐	**Casualty and Theft Losses (for Federally Declared Disaster Areas Use Only)**
☐	**State Income Taxes Paid**
☐	**State and Local Sales Taxes Paid**
☐	**Real Estate or Personal Property Taxes Paid**
☐	**Unreimbursed Employee Business Expenses (State Use Only)**