

Keith Kenward CPA LLC
3880 Van Dyke Avenue, Ste 1000
Sterling Heights, MI 48312
Ph 586-473-0100
keith@keithkenwardcpa.com

Tax Appointment Checklist

Personal information -

- Last year's income tax returns, if you are a new client
(We will review last 3 years returns if available)
- Name, address, Social Security numbers (copy of SS cards requested for new clients) and Date of Birth for all
- 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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Tax Appointment Checklist (Continued)

Expense Data Required -

- Dependent Care Costs
- Education/Tuition Costs/Materials Purchased
- Medical/Dental, including mileage
- Mortgage/Home Equity Loan Interest/Mortgage Insurance
- Employment Related Expenses
- Gambling/Lottery Expenses
- Tax Return Preparation Expenses
- Investment Expenses
- Real Estate Taxes
- Auto license tab annual fee, sales tax paid on vehicle purchase, for all registered vehicles titled to you or spouse
- Estimated Tax Payments to Federal and State Government and Dates Paid
- Charitable Contributions Cash/Non-Cash, volunteer mileage
- Purchase qualifying for Residential Energy Credit
- IRA Contributions/Retirement Contributions
- Home Purchase/Moving Expenses