THE BOTTOM LINE
INCOME TAX SERVICES
YOUR BOTTOM LINE IS OUR TOP PRIORITY!

1205 N Highway 123 Ste 300
San Marcos, TX 78666
Phone: (512) 392-4472
Fax: (512) 878-0348
contact@bottomlinesmtx.com

Tax Appointment Checklist

Personal Information

- ☐ Last year's income tax documents (for new clients)
- ☐ Name, address, Social Security number and Date of Birth for yourself, spouse and dependents
- ☐ Dependent(s) Information: Name, Address, Tax ID and S.S.N.
- ☐ Banking information if Direct Deposit Required

Income Data Required

- ☐ Wages (i.e. Form W-2) 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 (Form 1099)/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