



## CLIENT DATA CHECKLIST

Check any item provided to Taximum professional. Sign and date.

- |   |  |
|---|--|
| <input type="checkbox"/> Taximum Engagement Letter                              | <input type="checkbox"/> Alimony paid or received                            |
| <input type="checkbox"/> Client data Sheet                                      | <input type="checkbox"/> Record of purchase or sale of residence             |
| <input type="checkbox"/> Wage statements/ W-2s (# _____ )                       | <input type="checkbox"/> Medical and dental expenses                         |
| <input type="checkbox"/> Social Security Cards                                  | <input type="checkbox"/> Real estate and personal property taxes             |
| <input type="checkbox"/> Valid Driver's License(s)                              | <input type="checkbox"/> State or local taxes paid                           |
| <input type="checkbox"/> Dependant's Social Security numbers and dates of birth | <input type="checkbox"/> Estimated taxes of foreign taxes paid               |
| <input type="checkbox"/> Last year's Federal and State tax return               | <input type="checkbox"/> Cash and non-cash charitable donations              |
| <input type="checkbox"/> Self-employment business income and expenses/1099-MISC | <input type="checkbox"/> Mortgage or home equity loan interest paid/1098     |
| <input type="checkbox"/> Unemployment income/1099-G                             | <input type="checkbox"/> Unreimbursed employment-related expenses            |
| <input type="checkbox"/> Commissions received/paid                              | <input type="checkbox"/> Job-related educational expenses                    |
| <input type="checkbox"/> Pension, retirement income/ 1099-R                     | <input type="checkbox"/> Educator expenses                                   |
| <input type="checkbox"/> Cancelled Debt Amount/1099-C                           | <input type="checkbox"/> Tuition and Education Fees/1098-T                   |
| <input type="checkbox"/> Social Security income / SSA-1099                      | <input type="checkbox"/> Student loan interest / 1098-E                      |
| <input type="checkbox"/> IRA Contributions                                      | <input type="checkbox"/> Casualty or theft losses                            |
| <input type="checkbox"/> Statements on the sales of stocks or bonds/ 1099-B     | <input type="checkbox"/> Child care expenses and provider information        |
| <input type="checkbox"/> Interest and dividend income/1099-INT/1099-DIV         | <input type="checkbox"/> Information concerning your stimulus payment checks |
| <input type="checkbox"/> Lottery or gambling winning/losses                     | <input type="checkbox"/> Other _____   |
| <input type="checkbox"/> State refund amount/1099-G                             | _____  |
| <input type="checkbox"/> Income and expenses from rentals                       | _____  |

NOTES \_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
*Client Print name*

\_\_\_\_\_  
*Client Signature*

\_\_\_\_\_  
*Date*

\_\_\_\_\_  
*Tax professional Print name*

\_\_\_\_\_  
*Tax professional Signature*

\_\_\_\_\_  
*Date*