

SSATS Tax Appointment Checklist

* A copy of your prior year tax return
* Income statements (W-2’s, 1099’s, gambling winnings, retirement, broker statements, interest and dividend income, misc income)
* IRA Contributions
* IRS or state tax notices
* Itemized deductions (Mortgage interest, real estate taxes, excise taxes, gambling losses, donations)
* Education (Student loan interest, tuition fees and expenses)
* Health Insurance Statements
* Health Statements (1095-A, 5498SA, 1099QA)
* New client form (Located under the resources tab)
* Retirement distributions
* Social Security benefits