



TAX APPOINTMENT PREP CHECKLIST

- Driver's License(s)
- Direct Deposit Information
- W-2's
- 1098-T (College Student)
- 1099's
- Work Expenses
- Business Income/Expenses
- Rental Income/Expenses
- Mileage Log
- Child Care Expenses
- Child Residency Verification

NOTES

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- Are you claiming anyone? _____
 - Has there been any income changes? _____
 - Has there been any education changes? _____
 - Have there been any large purchases? _____
 - Did you get married/divorced? _____
 - Did you have a baby? _____
 - Did someone you claim pass away? _____
 - Did you move? _____
 - Did you retire/change jobs? _____



TAX APPOINTMENT EXPENSE TRACKER

MONTH: _____

YEAR: _____

ACCOUNT: _____

- Receipts
- Bank/Credit Card Statements
- Asset Purchases

AMOUNT	CATEGORY	EXPENSE DESCRIPTION
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
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_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

NOTES



TAX APPOINTMENT MILEAGE LOG

MONTH: _____

YEAR: _____

CAR: _____

MONTH MILEAGE START: _____

MONTH MILEAGE END: _____

TOTAL MONTH MILEAGE: _____

DATE	START MILEAGE	END MILEAGE	TOTAL MILEAGE	LOCATION/ DESCRIPTION

NOTES