

源信電腦報稅公司
GOLDEN CAPITAL ELITE INC.

15 Elizabeth Street, Rm# 410 ; New York, NY 10013 ☎ Phone#: 212-226-2070

TAX APPOINTMENT CHECKLIST

Make sure you bring:

Whether you choose to have your tax return prepared remotely via phone, or meets with us in our office, please review the following list of items that may pertain to you and will be important to help us complete your tax return.

GENERAL INFORMATION & INCOME:

- ___ 1. Copy of last year's Federal & State Tax Return (New Clients & Former Clients who skipped previous year)
- ___ 2. Copy of Driver's License/Federal Issued ID for Taxpayer & Spouse (for New Clients, or Expired IDs, None submitted last year)
- ___ 3. Taxpayer/ Spouse/ Dependent(s)'s Social Security Numbers, Full Names [as they appear on Social Security Card]
(for New Clients or Any New Additions such as spouse or dependent)
- ___ 4. All Income Statements: • Forms W-2 • Unemployment income • State Tax refund (1099-G) • Forms 1099-MISC • Schedule K-1
• Social Security (1099-SSA) • Pension or Retirement IRA/Annuity income (1099-R) • Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)
• Health Savings Account (HSA) • Lottery or Gambling income/losses (W-2G) • Prizes and awards • Record of Estimated tax payments made
• Trusts • Royalty Income • Any other 1099s received • Rental income information
• Income from sales of stock or property (1099-B, 1099-S) ✍ Dates of acquisition & records of cost or other basis (if basis not reported on 1099-B)

DEDUCTIONS:

- ___ 5. Property Tax Statements • Forms 1098 or other mortgage interest statements • Real estate and personal property tax records
- ___ 6. Interest Paid • Mortgage Statement (Form 1098) • Escrow Papers (Final Closing Stmt HUD-1) for purchase/sale/refinance of properties
- ___ 7. Medical Costs: Total Out-of-Pocket expenses paid for doctor, dentists, lab fees, prescriptions, hospitals, etc. (Must be over 7.5% of gross income to be deductible)
- ___ 8. Contributions • Cash/Check to Charities, Religious Organizations, schools • Records of Non-Cash charitable donations

OTHER:

- ___ 9. Childcare Expenses • Amount paid, Name, Address & Phone, Tax ID# of provider
- ___ 10. College Tuition • Form 1098-T ►► note freshman, sophomore, etc), Amount of books/supplies/computer if required by school
• Receipts of qualified educational expenses • Form 1098-E if paid student loan interest
- ___ 11. Retirement & Other Savings • HSA Contributions Form 5498-SA • IRA Contributions Form 5498
- ___ 12. Health Insurance • If enrolled in insurance plan through the Marketplace, Form 1095-A
- ___ 13. Automatic Deposit of Refund • Must provide Cancelled check, or Direct Deposit Form from Bank
- ___ 14. Previous Year Tax Returns • Must provide copy of Federal and State Tax returns if prepared elsewhere

☎ Office Hours (Tax Season ~through April 18th, 2023): Monday to Sunday 9:00 am – 5:00 pm. (subject to change due to COVID-19)

☎ Appointments for 2022 Income Tax preparation can be made at WWW.GOLDENCAPITALELITE.COM.
Please let us know if you are scheduling for more than one Tax Return.

☎ Payment due upon completion of income tax return must be made at final pick-up of paperwork or at time of appointment or by mail.

☎ Please note that Completed Returns will not be electronically filed until *both* the signed E-file Authorization and Payment is received by us.