

**HUTTERER**  
TAX & ACCOUNTING, LLC.

928 WELLS FARGO PLAZA  
7900 XERXES AVENUE SOUTH  
MINNEAPOLIS, MINNESOTA  
55431-1123

OFFICE (952) 831-8585  
FAX (952) 842-0999  
CH@HUTTERERLLC.COM

## **NEW CLIENT**

### **Tax Appointment Checklist**

- **Personal information -**
  - Last 2-3 years income tax
  - Name, address, Social Security number and Date of Birth for yourself, spouse and dependents
  - Dependent Provider, Name, Address, Tax ID and S.S.N.
  - Banking information if Direct Deposit Required
  
- **Income Data Required -**
  - Wages 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/Tips
  - Foreign Income

# CRISTILYN HUTTERER

TAX & ACCOUNTING, LLC.

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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