Wink, Inc.
Wink Tax Services, Inc.

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(248) 816-1220 / (800) 276-8319 / Fax (248) 816-1256

Specialists in Taxation, Business Formation, Tax Planning & Tax Resolution, Retirement & Social Security Planning.

Tax Appointment Checklist

Call 248-816-1220 to schedule an appointment or schedule online at
https://bookmeatime.com/winktax or
www.winktax.com and www.winktax.tax

Secure File & Messaging Portal: https://verifyle.com/@winktax

Secure File Portal: https://app.financial-cents.com/cp/winktax [no password required]

We offer in person, in office appointments, virtual phone or video appointments and drop office service.

Taxpayer/Dependent Information

- ☐ *Last year's tax return* ***(new client only)***
- ☐ *Social Security cards* ***(new client only)***
- ☐ *Social Security cards – new spouse/dependents*
- ☐ *Driver's license/ID (****new client only)***
- ☐ *Death of taxpayer/dependent*
- ☐ ***Note any changes:***
  - ☐ *Marriage*
  - ☐ *Divorce*
  - ☐ *New Dependents*
  - ☐ *Dependents who have moved out*
  - ☐ *Address – Moved*
  - ☐ *Email changes*
- ☐ *Bank Information for Direct Deposit*

Income

- ☐ *Form(s) W-2*
- ☐ *Interest Income (Form 1099-INT)*
- ☐ *Dividend Income (Form 1099-DIV)*
- ☐ *Prior year state refund amounts*
- ☐ *Alimony received*
- ☐ *Business Income and expenses*
- ☐ *Stock or personal asset sales*
- ☐ *Sale of a business or business assets*
- ☐ *IRA distributions (Form 1099-R)*
- ☐ *Pension/Annuity income (Form 1099-R)*
- ☐ *Rental property income and expenses*

☐ *Farm income and expenses*
☐ *Unemployment income (Form 1099-G)*
☐ *Social Security Benefits (Form 1099-SSA)*
☐ *Railroad Retirement (Form RRB-1099 (R))*
☐ *Gambling winnings/losses (Form W-2G)*
☐ *Miscellaneous Income (Form 1099-MISC)*
☐ *Non Employee Compensation (Form 1099-NEC)*
☐ *Payment Card & Third Party Network Transactions (Form 1099-K)*
☐ *Distributions From an HSA, Archer MSA or Medicare Advantage MSA (Form 1099-SA)*
☐ *Refunds of amounts previously deducted, State and Local*
☐ *Schedule K-1*

Adjustments to Income

☐ *Health Savings Account contribution - HSA*
☐ *Moving expenses (military personnel only)*
☐ *SEP, SIMPLE contributions*
☐ *Early withdrawal penalty on savings*
☐ *Health insurance paid for self-employed*
☐ *Alimony paid (amount & SSN of recipient)*
☐ *IRA contributions*
☐ *Student loan interest*
☐ *Classroom supplies (K-12) Educator Expenses*

Itemized Deductions

☐ *Medical expenses (PAID)*
- ☐ *After-tax insurance premiums*
- ☐ *Hospital/Doctors/Dentists*
- ☐ *Long-term insurance premiums*
- ☐ *Prescriptions*
- ☐ *Hearing aids/batteries*
- ☐ *Eyeglasses/contacts/contact solution*
- ☐ *Medical mileage*
- ☐ *Marketplace Health Insurance*

☐ *Real estate taxes*
☐ *Personal property taxes*
☐ *Home mortgage interest (Form 1098)*
☐ *Charitable contributions (cash/check)*
☐ *Charitable contributions (noncash)*
☐ *Charitable mileage*
☐ *Casualty losses (Presidentially declared disaster areas)*

Health Insurance

- ☐ *Form 1095-A if you enrolled in an insurance plan through the Marketplace (Exchange)*
- ☐ *Form 1095-B and/or 1095-C if you had insurance coverage through any other source (i.e. an employer, insurance company, government health plan such as*
- ☐ *Medicare, Medicaid, CHIP, TRICARE, VA, etc.*
- ☐ *Marketplace exemption certificate (ECN) if you applied for and received an exemption from the Marketplace (Exchange)*

Retirement & Other Savings

- ☐ *Form 5498-SA showing HSA contributions*
- ☐ *Form 5498 showing IRA contributions*
- ☐ *All other 5498 series forms (5498-QA, 5498-ESA)*

Credits

- ☐ *Child and dependent care expenses*
- ☐ *Education expenses*
  - ☐ *Forms 1098T - E - or 1099Q*
- ☐ *Residential energy expenses*
- ☐ *Adoption expenses*

Taxes Paid

- ☐ *Estimated taxes paid (federal and state)*
- ☐ *Extension payment*

Misc. Items

- ☐ *First-time homebuyer credit repayment*
- ☐ *Household employee information*
- ☐ *Tips received*
- ☐ *Sale or purchase of a personal residence*
- ☐ *HUD-1 statement -* ***home purchase or refinance***
- ☐ *Disaster Declaration Federal* _________________

Virtual / Digital Asset / Crypto Currency

- ☐ *Yes - Bought, Sold, Traded or Spent*
- ☐ *NO – Did Not use, buy, sell*

Questions regarding Income Tax, Retirement, Social Security, Finances

- ☐ ____
- ☐ ____
- ☐ ____
- ☐ ____
- ☐ ____
- ☐ ____