



White Oak Tax Solutions  
810 S 4th Street  
DeKalb, IL 60115  
(815) 758-7111

## 2023 TAX APPOINTMENT CHECK OFF LIST

Any Changes to the Following:

- Filing Status
- Address
- Best Phone number - email address
- Add / Remove Dependents
- Banking Information - Routing and Account Numbers
- Virtual Currency
- Foreign Income
- Drivers License if new client or renewed since last year
- Social Security Card(s) - new client, new dependent or not in file
- Health Care - if you have Marketplace, Form 1095-A
- Health Savings Account Deduction
- W-2's
- Any 1099's
- Any K-1's
- Self Employment Documentation
  
- Sell OR Purchase a home (need Settlement or Disclosure Statement)
- Real Estate Taxes
- Mortgage Interest
- Rental Property
  
- Client with Dependents
- Child Proof of Residency - medical bills, school mailing
- Childcare costs - Need Name, Address and EIN Number of Provider
  
- College tuition - Need Bursars Statement
- School Loan Interest
  
- Any Correspondence from IRS or State Agency (such as IL Department of Revenue)