



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

2024 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 on 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 AND 1098-T
 - School Loan Interest
- Any correspondence from IRS or State Agency (such as IL Department of Revenue)