

TAX INFORMATION CHECKLIST

IDENTITY VERIFICATION IS NEEDED TO PREPARE RETURNS.

____ Photo ID (both husband and wife if filing a joint return. Acceptable ID includes a State Issued Driver's License OR photo ID. School ID (with a photo), Military ID, VISA or passport, National ID.

____ Valid Social Security Card or ITIN card for every person listed on the tax return. Acceptable substitutes are Form SSA11099 or a Medicare card that includes the letter "A" after the SSN.

____ Bank routing numbers and account numbers for direct deposit or debit. (This is optional)

____ If you have Covered California, you MUST have a 1095 to begin preparing the return.

DID YOU WORK LAST YEAR? PLEASE BRING THE ITEMS BELOW.

____ W-2 OR W2G ____ 1099-NEC ____ 1099-G (Unemployment wages)

ARE YOU RETIRED OR NOT IN THE WORKFORCE? PLEASE BRING THE ITEMS BELOW.

____ Social Security (SSA-1099) or Railroad Retirement Benefits

____ Retirement income or payments from pensions

____ Interest and dividend statements from banks (Form 1099-INT or 1099-DIV).

WERE YOU OR YOUR DEPENDENT ENROLLED IN COLLEGE? PLEASE BRING THE ITEMS BELOW.

____ Form 1098-T ____ Student Loan Interest form 1098-E ____ Scholarship and College Expenses

DID YOU HAVE OTHER INCOME AND/OR EXPENSES? PLEASE BRING THE ITEMS BELOW.

____ Mortgage interest Form 1098

____ Gambling, lottery, or other income

____ Total paid for day care and the day care provider's identifying number.

____ A copy of previous year's tax return if you had a capital gain or loss carryover (Line item 7 on your IRS return.

____ Medical Insurance from 1095-A, 1095-B or 1095-C. You will need these for your state return.