



INCOME TAX CHECKLIST

Personal Documents:	Valid photo I.D (CA Driver's License, I.D or Matricula) Social Security Card/ITIN's (Taxpayer(s)/Dependent(s)) Bank Account Info for Refund or Balance Payment Health Insurance: 1095A Covered CA or 1095B Medical
Personal Information:	<ul style="list-style-type: none"> • <i>For <u>NEW</u> clients, please bring prior year's tax return</i> Mailing and/or Physical Address Date of Birth (Taxpayer(s)/Dependent(s)) <ul style="list-style-type: none"> • <i>For <u>Child Dependents</u>:</i> Birth Certificates to show relation School/Medical Records to reflect listed address for a year 1095B Medi-Cal Insurance Coverage <ul style="list-style-type: none"> • <i>For <u>Other Dependents</u>:</i> Documents to prove relationship and same address
Income Documents:	<ul style="list-style-type: none"> • W-2 forms • Self Employed: 1099-NEC (report of income and expenses, receipts) • Unemployment/PFL: 1099-G • Interest Income: 1099-INT • Social Security: 1099-SSA • IRA/Pension: 1099-R • Gambling Income: W2G • Rental Income: Reports of Rents Received and Expenses • Stocks/Cryptocurrency: 1099-B or Transaction Statement • Cancellation of Debt: 1099-C • Misc. Income: 1099-Misc
Tax Deductions / Expenses	Child Care Provider Information (Name, Address, SSN) Tuition Statement 1098-T and receipts for school expenses Mortgage Statement and Property Taxes Bill Regarding Solar Credit: Sales Contract (no leases) Auto Interest Form (if bought in 2025) Last paystub or printout for overtime calculation (if applies)