



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 NEW clients, please bring prior year's tax return</i> <p>Mailing and/or Physical Address Date of Birth (Taxpayer(s)/Dependent(s))</p> <ul style="list-style-type: none">• <i>For Child Dependents:</i> Birth Certificates to show relation School/Medical Records to reflect listed address for a year 1095B Medi-Cal Insurance Coverage• <i>For Other Dependents:</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)