

INCOME TAX CHECKLIST

- Valid I.D and Social Security Cards/ITINS
- W2 Forms
- Form 1099-M
- Unemployment Forms
- Interest Forms from Banks and IRS
- Insurance Forms from the Marketplace, employer, or Medi-Cal
- If sold stocks, Form 1099-B
- If have rental income: Income and Expense reports
- If self-employed: Income and Expense reports and Form 1099-NEC
- If claiming any dependents: proof they lived with you all year, such as school records, doctor letter or health insurance letter. Proof must contain their name and address.
- If claiming education credits: Form 1099-T and school expenses and receipts.
- And any other tax forms that were given or received.

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