



INCOME TAX CHECKLIST

<p>Personal Documents:</p>	<p>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 Any IRS or FTB letters</p>
<p>Personal Information:</p>	<ul style="list-style-type: none"> • <i>For <u>NEW</u> 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><u>For Child Dependents:</u></i> <p>Birth Certificates to show relation School/Medical Records to reflect listed address for a year 1095B Medi-Cal Insurance Coverage</p> <ul style="list-style-type: none"> • <i><u>For Other Dependents:</u></i> <p>Documents to prove relationship Documents to reflect same listed address</p>
<p>Income Documents:</p>	<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
<p>Tax Deductions / Expenses</p>	<p>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)</p>