

Documents to Bring to Your Tax Preparation Appointment

It is imperative that you bring all of your tax documents to your interview appointment. We cannot prepare your return without all documents. If you have missing documents, you will be required to return with those documents at a later date

Documents to bring include:

Must Haves

- Government issued photo ID for taxpayer (and spouse, if filing jointly)
- Social security cards or other official document (e.g. SSA-1099) that show the complete social security number or taxpayer identification number **for all persons included on the tax return (spouse & dependents)**
- Blank check with bank routing number and account number (if you desire direct deposit or direct debit or your refund/payment)
- Copy of previous year's tax return

Income

- Wage statements - W-2 from each employer
- Pension & IRA distribution statements - 1099-R
- Social security benefits statements - SSA-1099
- Interest statements - 1099-INT
- Dividend statements - 1099-DIV and/or broker statements
- Unemployment compensation statement - 1099-G
- Self-employment compensation statements - 1099-NEC and 1099-MISC
- Capital gain/loss information - 1099-B or broker statements
- Refund of state/local income tax - 1099-G
- Gambling & lottery winnings statement - W-2G

Deductions

- Listing and amounts for Itemized deductions - a worksheet is available on the "Forms" page of our website
- Summary list of medical/dental/vision expenses, including doctor/hospital, prescriptions, medical and long-term care insurance premiums
- Mortgage interest statement - 1098
- Property taxes paid
- Vehicle registration taxes paid
- Summary of cash and non-cash donations to charity

Credits/Adjustments

- Tuition & scholarship payment statement - 1098-T
- Student loan interest statement - 1098-E
- List of education expenses – a worksheet is available on the "Forms" page of our website

Health Insurance

- Health insurance marketplace statements - 1095-A
- Health insurance coverage statements - 1095-B, 1095-C
- CA health insurance assistance - Form 3895

Payments

- Records of any federal or state estimated taxes paid
- Record of sales tax paid on a major purchase (auto, boat, appliances)