WHAT TO BRING WITH YOU FOR TAX PREPARATION

All documents must be printed out on paper. Digital copies are *NOT* acceptable

SOCIAL SECURITY CARDS for ***EVERY*** person on return to include spouse & dependents
(A 1099 SSA, a letter w/ your SS# from SS Admin or last year's completed return may be accepted)

Picture ID **for taxpayer (and spouse). Married? Both must be present.**

Below are some of the items you might need to complete your return:

-A copy of last year's tax return.
-A paper check w/ account and routing #s for direct deposit refund
-Amount and date of estimated tax payments made, if any

Income:

-W-2 from each employer
-Unemployment compensation statements (1099-G)
-Social Security form if receiving social security benefits (SSA-1099)
-Pension and annuity forms (1099-R)
-All forms showing interest, dividends (1099-INT,1099-DIV)
-Capital Gains/Brokerage statements (1099-B)
All stock sales require purchase date and cost (basis) of stock.
-All records regarding any other income received (1099 Misc, business)
-Gambling winnings (W2-G)
-Form (1095-A) if you bought Health insurance through Covered CA
-Child care provider name, Tax Identification number, amount paid
-Educational expenses, student loan interest payments (1098-T)

Itemizing Deductions?

(Schedule A) Bring receipts or statements for:
-Mortgage Interest
-Real Estate Taxes. Sales tax paid for big ticket items purchased.
-Bill from DMV (Only vehicle license fee is deductible)
-Summarized list of medical, dental and vision expenses, mileage to/from.
-Summarized list of charitable contributions, mileage
-Union dues, tax prep fees, uniform expenses

Some (but not all) reasons we may not be able to do your taxes:

-you did not live in California the whole tax year
-you are married but your spouse is not filing with you
-you own rental property, or you rent out a room in your home
-some K1 forms (if more than interest)

Bring anything else you think may be applicable.

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