

Here is a checklist of items to bring with you to your appointment.

Please note that many of these items may not pertain to you.

- Wage statements (W-2)
 - Self-employment business income and expenses 1099-MISC
 - Commissions received/paid
 - Pension, retirement income (Form 1099-R)
 - Unemployment income (Form 1099-G)
 - Canceled Debt Amount (Form 1099-C)
 - Social Security income (Form SSA-1099)
 - IRA contributions
 - Statements on the sales of stocks (1099-B or Consolidated 1099)
 - Interest and dividend income (Forms: 1099-INT & 1099-DIV)
 - Lottery or gambling winnings/losses
 - State refund amount (Form 1099-G)
 - Income and expenses from rental properties
 - Alimony paid or received (Name & SSN of other party is needed!)
 - Record of purchase or sale of residence or investment property
 - Medical and dental expenses
 - Real estate and personal property taxes
 - State or local taxes paid
 - Estimated taxes (1040-ES or 540-ES payments made)
 - Cash and non-cash charitable donations
 - Mortgage or home equity loan interest paid (Form 1098)
 - Educator expenses
 - Tuition and Education Fees (Form 1098-T from school)
 - Student loan interest (Form 1098-E)
 - Casualty or theft losses
 - Child care expenses and provider information (Name, Address, Phone Number, Tax ID or SSN)
 - If you have a pre-tax dependent care account with your employer, please let us know.
 - Proof of Insurance coverage for everyone on the tax return (Form 1095-A, 1095-B, or 1095-C)
 - If you had an insurance plan through Covered California please bring in form 1095-A (Very Important!)
 - Banking and routing numbers if wanting to receive your refund via direct deposit
- NEW CLIENTS**– Please bring Social Security Cards for everyone on the return, Driver's licenses for filer and spouse if filing joint, and a copy of your most recent tax return.

EITC (Earned Income Tax Credit) Items

** Please note that clients who receive EITC (Earned Income Tax Credit) need to bring in additional documentation for each dependent on the return. The income limits for EITC depend on filing status, as well as how many dependents are on the return. To make this simple we are asking that anyone making less than \$55,000 in total income bring in at least one of the following for each dependent.

- School records or statement
- Landlord or property management statement
- Health care provider statement
- Medical records
- Child care provider records

This is just to show that the child lives with you. A copy will be kept in your file. The IRS is cracking down on EITC and Child Tax Credit fraud and they want us to make sure that you are able to legally claim the child for the credit. Please get a copy of one of the above before you come in to do your return. Not having one of the items may cause a delay in receiving your refund.