

TAX PREPARATION CHECKLIST

1. PERSONAL INFORMATION

Bring **all** documents below

- Valid Photo Identification Card** for yourself, spouse and/or dependents
- Taxpayer Identification Number:** Social Security Card, Social Security Number verification letter, or Individual Taxpayer Identification Number (ITIN) for yourself, spouse and/or dependents
- Both spouses** must be present for married filing jointly

2. INCOME

Bring **all** documents that apply

- W-2s** for all jobs
- 1099s** for any other income received last year including unemployment income
- Statements for prizes, scholarships/fellowships, or lottery/gambling winnings

3. HEALTH COVERAGE

Bring **all** documents that apply

- 1095-A** and **Form 3895** California Health Insurance Marketplace Statement, if you had coverage through the Marketplace, (Covered California or Obamacare)
- 1095-B** or **1095-C** if you had other kinds of insurance or coverage

4. ADDITIONAL DOCUMENTS

Bring **all** documents that apply

- Checking and savings account information** to have your refund directly deposited
- Tax return from last year**, if possible
- Child care expenses:** providers' address, phone #, and federal tax ID #
- Education:** 1098-T college tuition and 1098-E student loan statements
- Homeowners:** 1098 mortgage statement and property tax bill
- Alimony** paid or received
- Notices:** IRS, state tax, Health Insurance Marketplace, or anything that says "IMPORTANT TAX DOCUMENT"