



Individual Tax Returns Required Forms & Documents

Individual Returns:

- Last year's tax return; all pages
- Valid picture ID's for all tax filers
- Social Security cards for all tax filers and all dependents
- Income statements; W-2 forms, 1099 forms, Social Security income (Form SSA 1099), Interest income (Form 1099-INT), Retirement/ Pension income (Form 1099R)
- Forms 1095A & 3895 (Covered CA health insurance)
- Itemized deductions:
 - Medical insurance premiums
 - Medical Expenses, dental, vision, hearing and prescription drugs
 - Mortgage Interest (form 1098) and property taxes
 - Charitable contributions; cash and non-cash
- Rental Property: Download worksheet from website & complete.
 - Annual rent received
 - Insurance premiums
 - Repairs & maintenance
 - Property taxes
- Investment accounts; Year-end statements (all pages)
- Sale of primary residence; Final Settlement Statements (both when purchased and when sold). Description and cost of all improvements made to the property.
- Miscellaneous documents

Business/ Self-Employed (Sch "C") Returns/ LLCs (Single Member):

- All documents required for individual returns plus;
- Self-Employed Worksheet (download from website)
- All business income; gross receipts
- All business expenses; itemized and totaled
- Equipment purchases and rentals; itemized including description and date of purchase
- Vehicle mileage used for business; include date vehicle was 1st placed in service
- Beginning and ending inventory in dollar amounts