



Required Forms & Documents

Individual Returns:

- 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)
- Form 1095A (Covered CA health insurance)
- Itemized deductions:
 - Insurance premiums
 - Medical Expenses
 - Dental expenses
 - Vision Expenses
 - Prescription drugs
 - Mortgage Interest (form 1098) and property taxes
 - Charitable contributions
- Rental Property:
 - Annual rent
 - Insurance premiums
 - Repairs & maintenance
 - Property taxes
- Investment accounts; Year-end statement (all pages)
- Miscellaneous documents

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

- All documents required for individual returns plus;
- All business income
- All business expenses
- Equipment purchases and rentals
- Vehicle mileage used for business (date vehicle was 1st placed in service)
- Beginning and ending inventory dollar amounts

For more details, please contact us at (559) 733-8637.