



Ready to file? Call us at **(951) 546-4188** to make an appointment.
 We will create a secure online folder where you can upload all your documents.

PERSONAL INFORMATION

Bring **all** documents below:

- Valid picture ID
- Social Security Card, as well as those of anyone you may be claiming on your tax return, including your spouse if you are filing jointly
- Tax return from last year (New Clients)

PROOF OF INCOME

Bring **all** documents that apply:

- W-2s for all jobs last year
- 1099s for all contract work, COD, or any others
- 1099Rs from retirement income
- Statements for prizes, scholarships/fellowships, or lottery/gambling winnings
- Income from unemployment or social security benefits
- Income from the previous year's state and local tax returns
- Income from any rental properties you may own
- Income adjustment, credit, and deduction documents
- Broker statements from investment income

OTHER DOCUMENTS

Bring **all** documents that apply:

- Contributions and distributions from HSA or MSA
- Contributions to an IRA
- Interest from bank accounts, investments, stocks, or other property
- Costs related to education (1098-T and 1098-E)
- Costs related to medical care from prescriptions, doctors, hospitals, or other providers

ADDITIONAL ITEMS

Bring **all** documents that apply:

- Child care expenses: provider's address, phone #, and federal tax ID # and amount paid
- Homeowners: 1098 mortgage statement & property tax bill
- Education: 1098-T college tuition and 1098-E student loan statements
- Alimony paid or received
- 1095A and Form 3895 California Health Insurance Marketplace Statement, if you had coverage through the Marketplace
- Notices and letters from: IRS, state tax, health insurance marketplace, or anything that says tax document
- Estimated payments made, date & amount for each

IMPORTANT TAX DOCUMENTS

Bring **all** documents that apply:

- Receipts from charitable donations
- Receipts from moving expenses for active military only
- Bank account and routing number if you want your refund direct deposited

NOTES
