

Tax Checklist

All Taxpayers

- ☐ W-2, 1099-R,
- ☐ Identification/ Driver's License
- ☐ Dependents SSN + DOB (new dependents require social security card & birth certificate)
- ☐ Proof of Health Insurance ** Covered California 1095-A**
- ☐ Banking Info (routing & accounting number)

Business Owners/ Independent Contractor/ Uber/ Lyft/ Doordash Drivers

- ☐ Tax ID #
- ☐ Completed Organizer with expenses + income
- ☐ Mileage

Other Forms

IP PIN Number?

Did you or dependent attend college?

- ☐ 1098- T

Did you pay for childcare?

- ☐ Name of Provider
- ☐ Tax ID number
- ☐ Amount paid for the year?

- ☐ **IP PIN Number **

Homeowner

- ☐ Mortgage Interest Statement
- ☐ Property Tax Statement
- ☐ Out of pocket Medical/Dental Expenses
- ☐ Union Dues
- ☐ Charitable Donations
- ☐ Job expenses you are not reimbursed for