

# Tax Preparation Checklist

## What to bring to your appointment

### Personal Information

- ☐ SSNs or ITINS, full names, and birth dates for everyone included on your return
- ☐ Copy of Prior-year tax return (1<sup>st</sup> Time Customers)
- ☐ Amount of Alimony paid and ex-spouses SSN
- ☐ Childcare records (including providers tax id number) if applicable
- ☐ Records supporting child dependents claimed:
  - Birth Certificate (shows relationship)
  - Letter or Report Card from school, or Medical Records (shows address)

### Self-Employed & Business Information

- ☐ Tax ID Number, SOS CA Number, Business Start date, Business address
- ☐ List of Owners/Partners, Their SSNs, addresses and ownership percentage (if applicable)

### Income / Investments / Retirement

- ☐ All Income forms: W-2, 1099, 1098, Schedule K-1
- ☐ Self-employed and Businesses:
  - Summary of Cash income (monthly or yearly)
  - Profit and Loss

### Education

- ☐ Education Scholarships and Fellowships
- ☐ Records of Tuition and other higher education expenses, and Form 1098-T

### Itemized Deductions

- ☐ Form 1098, Mortgage Interest, Real Estate and Property Tax Records
- ☐ Records of cash amounts donated to houses of worship, schools, and other charitable organizations
- ☐ Records of non-cash expenses (dues, travel, publications, tools, uniform cost)
- ☐ Self-employed or Businesses:
  - Summary or List of business expenses
  - Itemized list of large investments / expenses (equipment, vehicles, property)

### Healthcare

- ☐ Form 1095-A if you enrolled in an insured plan through CoveredCA or another Marketplace
- ☐ HSA information (Forms 5498, 1099-SA) and receipts of medical expenses