

APPOINTMENT CHECKLIST

☐ **Valid ID/Driver's License**

☐ **Direct Deposit**

INCOME

☐ **Employer Jobs:** Form W-2 for **every** job worked in 2025

☐ **Independent Contractor:** 1099 and itemized list of your expenses

☐ **Unemployment or Paid Family Leave:** Form 1099-G

☐ **Social Security:** Form 1099-SSA

☐ **Gambling Winnings:** Form W2-G

TIPPED EMPLOYEES

☐ **Last Payroll Check of 2025 for Each Tipped Job**

OVERTIME

☐ **Last Payroll Check of 2025 for Every Job Worked Overtime**

BUSINESS OWNERS

☐ **Independent Contractor:** 1099 and itemized list of your expenses (visit www.taxlopez.com, click on the expense sheets tab and fill out Schedule C PDF)

HEALTH CARE

☐ **Medical, Medicare or through employer:** Form 1095

☐ **Covered California:** Form 1095-A (**MANDATORY** to file)

☐ **Marketplace Insurance:** Form 1095-A (**MANDATORY** to file)

EDUCATION

☐ **Student Loans:** Form 1098-E

☐ **University/College:** Form 1098-T, books, parking, supplies, lab fees, equipment, grad fees.

*Ask parents if they will be claiming you. If **yes**, give form 1098-T to your parents. If **no**, ask how many years they have taken the American Opportunity Credit on your behalf.

DEPENDENTS

☐ **Newborn:** Social security card

- ☐ **All dependents:** Proof of residency (Must be from doctor, school or Form 1095 from health insurance provider)
- ☐ **Daycare:** Federal ID number/SSN, name, address, phone number and amount paid
- ☐ **Paid Family Leave:** Form 1099-G

HOMEOWNERS

- ☐ **Homeowner:** 1098 mortgage interest statement and property taxes (visit www.taxlopez.com, click on the expense sheets tab and fill out Schedule A PDF)
- ☐ **Rental Properties:** Income and itemized list of expenses (visit www.taxlopez.com, click on the expense sheets tab and fill out Schedule E PDF)
- ☐ **Bought, Sold or Refinanced Home:** Final closing statement from **escrow**
- ☐ **Sold Home:** Purchase price and purchase date of home sold
- ☐ **Solar Panels:** Bill of sale
- ☐ **Bought Car:** Purchase agreement (553)
- ☐ **Out of Pocket medical Expenses:** Keep receipts for your records
- ☐ **Car Registrations**
- ☐ **Donations:** Keep receipts for your records

INVESTMENTS

- ☐ **HSA Distributions:** Form 1099-SA
- ☐ **HSA Contributions:** Last paystub of 2025 with year-to-date totals
- ☐ **Crypto Trading:** 1099-B and cost basis
- ☐ **Stock Sales:** 1099-B
- ☐ **Interest Income:** 1099-INT
- ☐ **Dividend Income:** 1099-DIV
- ☐ **401K/IRA Cash Out:** Form 1099-R
- ☐ **Pensions Distribution:** Form 1099-R
- ☐ **S-Corporation:** Forms K-1 and 7203
- ☐ **LLC/Partnerships:** Forms K-1