

## 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](http://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](http://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](http://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