



# What do I Bring to My Tax Appointment?

## Personal Information

### Taxpayer

- Valid Identification
- Social Security Card or ITIN
- Proof of Residence (ex: sdge / home rental agreement, etc.)

### Spouse's

- Valid Identification
- Social Security Card or ITIN

### Dependent's

- Social Security Card
- Birth Certificate (if requested)
- Medical Records (under 5 years)
- School Transcripts (over 5 years)
- Childcare records (including the provider's tax ID number, if applicable)
- Form 8332 showing that the child's custodial parents is releasing their right to claim a child to you, the non-custodial parent (if applicable)
- College Student 1098-T or/and 1098-E (if applicable)

## Sources of Income

### Employed

- Forms W2
- Bonus / 1099

### Unemployed/Other

- Unemployment (1099G)

### Self-Employed

- Forms 1099-NEC
- Sch K-1
- 1099-K
- Records of all expenses or credit card statements, and receipts
- Business Bank Statements
- Office in home (if applicable)
- Total business miles driven for the year

## Proof of Health Insurance

- Form 1095-A (if applicable)

## Retirement Income/SSI

- Pension/IRA/annuity income-R
- Social Security (1099-SSA)

## Other Income & Losses

- Gambling income (W-2G)
- Amount of alimony received and ex-spouse's name
- Healthcare reimbursements (1099-SA or 1099-LTC)
- Jury Duty Records
- Prizes and awards
- Other 1099 MISC
- Rental Income (records of income & expenses)

## Savings and Investments

- Interest, dividend income (1099-INT, 1099-OID), 1099-DIV)
- Income from sales of stock or property (1099-B, 1099-S)

## IRA Information

- Amount contributed (if applicable)
- Traditional IRA basis (after tax)

## Itemizing deductions

- Forms 1098 or other mortgage statements
- Real estate and personal property tax records
- Charitable donations

UPLOAD DOCS ONLINE



Call to make an Appointment!

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