**Tax Prep Checklist**

Personal Information

* Your social security card or tax ID
* Your spouse’s full name and social security number or tax ID
* Copy of last year’s return (new clients)

Dependent(s) Information

* Birth Certificate and social security card or tax ID number
* Proof of qualifying child or other dependent (i.e. school records, health care provider statement, etc.)
* Income of other adults in your home

Source of Income

* Wage and earning statements from all employers
	+ W-2 Form(s)
	+ W-2G
	+ 1099-R
	+ 1099-MISC
* Interest and dividend statements from banks (Forms 1099)
* Virtual Currency
* If unemployed, or received Paid Family Leave, state tax refund (1099-G)
* Self-employed
	+ Forms 1099, Schedule K-1
	+ Records of all expenses
	+ Business-use asset information for depreciation (cost, date placed in service)
	+ Records of estimate tax payments made (Form 1040-ES)
	+ Profit & Loss Form
* Rental Income
	+ Total rental income for the year
	+ Expense Report
	+ Rental asset information for depreciation (cost, date placed in service)
	+ Records of estimate tax payments made (Form 1040-ES)
* Retirement Income
	+ Pension/IRA/annuity income (1099-R)
	+ Social security/RRB income (1099-SSA, RRB-1099)
	+ Retirement plan contributions

Deduction Types

* Home ownership
* Charitable donations
* Childcare records if applicable (including provider’s tax ID number)
* Health Insurance, Medical expenses
* Educational expenses (1098-T, 1098-E)
* State and Local Taxes

Proof of Health Insurance

* Medi-Cal 1095-B
* Covered CA 1095-A
* Covered CA 3895
* Employer Sponsored 1095-C

**Earned Income Tax Credit**

Document of proof for Qualifying Child or Children should include:

* child(s) name
* your address
* document dated in Current Year

Residency proof of Qualifying Child or other Dependent

* School records or statements
* Landlord or a property management statement
* Health care provider statement
* Medical records
* Childcare provider records
* Placement agency statement, etc.