

**PLEASE BRING WITH YOU ANY OF THE FOLLOWING  
SUPPORTING DOCUMENTS TO PREPARE YOUR TAX RETURN:**

Please note that many of these items may not pertain to you.

- ☐ Personal Documents (applies to you, your spouse, and dependents): Photo ID, Social Security Cards, Date of Birth, Tax ID Number
- ☐ Bank Account & Routing Number/Voided Check for direct deposit (refund) or direct withdraw (owe)
- ☐ Childcare: Provider's Name, Tax ID Number, Phone Number, Address, Amount Spent for Each Child
- ☐ Income
  - W-2, 1099-MISC Self-Income, W-2G, K-1, Lottery Winnings/Losses
  - Retirement Income, 1099-R Pension, SSA-1099 Social Security
  - Other Income Sources, Unemployment, 1099-G State Refund Card, 1099
- ☐ Mortgage Escrow Interest 1099-INT
- ☐ Rental Property
  - Rental income, mortgage interest 1098, property taxes, repairs, cleaning, maintenance, etc.
  - If you lost your primary resident or rental property in 2022 bring the 1099-c or 1099-a received from each mortgage companies
- ☐ Escrow Papers, Refinances, 2<sup>nd</sup> mortgage, purchase of a new property
- ☐ Property taxes that you paid or any supplemental taxes
- ☐ Brokerage statement: 1099-DIV, 1099-B or 1099 Consolidated
- ☐ Business Income and Expenses (broken down into category: mileage, postage, continuing education, office supplies, cell phone, etc.)
- ☐ Capital gains or losses, sale of stock, bad debt loss, etc. (date acquired, cost, date sold, and sales date, final closing escrow papers, total amount of improvements, and original purchase price.)
- ☐ IRA: regular, Roth contributions, or SEP contributions
- ☐ Moving expense for military over 50 miles
- ☐ Medical Expenses: Doctors, dentists, glasses, hospital, prescriptions, etc.
- ☐ Educational Expenses: 1098-T, miles travelled to and from, Student loan interest (Form 1098-E)
- ☐ DMV fees paperwork or license renewals
- ☐ Sales tax for any large, purchased items in 2022 such as a vehicle or a newly constructed home
- ☐ Charitable Donations
- ☐ Disability judgement (state workman compensation award documents)
- ☐ State or local taxes paid, Estimated taxes (1040-ES or 540-ES payments made)
- ☐ Proof of Insurance Coverage for everyone on your tax return (Form 1095-A, 1095-B, or 1095-C)
- ☐ If you had an insurance plan through Covered California, please bring form 1095-A (Very Important)

**EITC (Earned Income Tax Credit) Items**

**\*\*Please note that clients who receive EITC need to bring in additional documentation for each dependent on the return. The income limits for EITC depend on filing status, as well as how many dependents are on the return. To make this simple we are asking anyone making less than \$55,000 in total income bring in at least one of the following for each dependent.**

- ☐ School records or statements
- ☐ Landlord or property management statement
- ☐ Health care provider statement
- ☐ Medical records
- ☐ Childcare provider records

This is just to show that the child lives with you. A copy will be kept in your file. The IRS is cracking down on EITC and Child Tax Credit Fraud and they want us to make sure that you can legally claim the child for the credit. Please get a copy of one of the above before you come in to do your return. Not having one of the items may cause a delay in receiving your refund.