



BRING THESE IMPORTANT ITEMS TO YOUR APPOINTMENT

- Copy of your **2020** tax return (**New Clients Only**)
- Valid State ID or Government Issued Identification for you/spouse
- Social Security Cards for you and your dependents
- Birth Certificates for your dependent children or relatives
- Proof of Health Insurance (1095-A Covered California or 1095-B) for you/spouse/dependents
- Student Data Printout for dependent children with you named as custodial parent or guardian, or court custody agreement
- Child care provider statement, including tax ID number, address, phone number and the total amount paid per child.
- W-2 forms for all jobs worked in 2021 or last pay stub (only after February 15)
- 1099-MISC: Self-Employment business Income & Expenses (If you don't have a 1099 bring proof of income such as bank statements or invoices)
- Amount of estimated tax payments made
- K-1's from Partnerships, LLC, S-Corps & Trusts
- 1099R if money was received from 401K or pension distributions in 2021
- 1099 form for investment income such as interest, dividends, stocks etc.
- Closing documents for Sale of Assets such as home or investment property
- 1099-G forms if unemployment insurance benefits were received at any time in 2021
- 1099-SSA: Social Security Income
- 1099-INT if bank interest was received in 2021
- 1098 form received from Mortgage Company
- Real estate taxes statement if not included on the 1098 mortgage statement
- W2-G if gambling income was received in 2021

- Charitable Contributions statement or cancelled checks
- Student loan interest statement
- 1098-T form (Tuition payment statement) if you were a student in 2021
- Income and Expenses from Rental Properties
- Voided check or Direct Deposit Acct Information