

# TAX PREPARATION CHECKLIST



These are the most commonly-used resources you'll need to successfully complete your taxes with any filing method:

- ☐ Social Security/ITIN Numbers and Birthdates for tax payer, spouse, and dependents. **Note: Clients must bring physical copies of Social Security cards for everyone on the return.**
- ☐ Income Documents for Taxpayer and Spouse (Forms W-2, 1099, Self-Employment Income, etc.)
- ☐ Any other tax forms you received
- ☐ 1095-A if you are insured by Covered CA or if you received credit from the healthcare.gov marketplace. **Physical copies of health insurance are required.**
- ☐ Bank Information for Direct Deposit - Account and Routing Number (can be found on a check). **Physical copies of banking information are required.**
- ☐ Form 1098-T if tuition was paid to an educational institution, or if a scholarship was received.
- ☐ Proof for qualified education expenses. (Ex. receipts, account statements, invoices, etc.)
- ☐ Last year's tax return (if you have it).
- ☐ If self-employed: Proof of business expenses and mileage. (Ex. receipts, mileage tracker, etc.)
- ☐ Access to cell phone, computer, and printer (If Self-Filing or using GetYourRefund).
- ☐ Government Issued ID for Taxpayer and Spouse.
- ☐ **For VITA** - Printed and Completed Intake Form 13614 (If possible).
- ☐ **If self-filing** - Your prior-year Adjusted Gross Income (AGI)

To maximize your refund we recommend collecting these - they may help you claim Credits and Deductions on your return:

- ☐ All qualified college education expenses (books, course materials, etc.)
- ☐ Childcare expenses: name address, Tax ID or Social Security Number of your child care provider.
- ☐ Retirement/IRA: Amount contributed to an IRA (Individual Retirement Account) that is not deducted from your wages with your current employer.
- ☐ Educator expenses for teachers K-12 (school supplies and materials used in the classroom).

Some Common Deductions Include:

- ☐ Charitable donations: list of contributions and amounts, receipts for contributions over \$250.
- ☐ DMV registration bill.
- ☐ Mortgage interest statement (Form 1098) and property taxes paid.
- ☐ Out of Pocket Medical Expenses.

**Note: This isn't a complete list of documents that may be required or beneficial for your return. These are only some of the most common ones.**

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"TAXES" to 211-211 or visit [MyFreeTaxes.org](http://MyFreeTaxes.org)

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ASSISTANCE PROGRAM