

# 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)

**VITA** VOLUNTEER INCOME TAX  
ASSISTANCE PROGRAM