SQ

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Tax Preparation and Notary Public

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What to Bring to Your Tax Appointment

Check only the items that apply to you. Complete records help reduce delays and follow-up.

CLIENT NAME ______________________ **TAX YEAR** __________

Every Client

- [ ] Photo ID for taxpayer and spouse
- [ ] Social Security or ITIN cards and birthdates for taxpayer, spouse, and dependents
- [ ] All W-2s and 1099s, including retirement, Social Security, investment, and self-employment forms
- [ ] Form 1095-A if anyone had Marketplace health coverage
- [ ] Mortgage interest Form 1098 and property-tax statements
- [ ] Vehicle registration statements for each vehicle
- [ ] Student-loan interest Form 1098-E and tuition Form 1098-T
- [ ] Childcare provider name, address, tax ID, and amount paid
- [ ] Closing or refinance statements for property purchases, sales, or refinancing
- [ ] Estimated-tax payment records
- [ ] Business, rental, or profession deduction worksheet and supporting receipts, if applicable
- [ ] Bank routing and account information for direct deposit, brought securely

New Clients Also Bring

- [ ] Federal and California tax returns for the previous two years
- [ ] Prior depreciation schedules, carryovers, K-1s, and business basis records, if applicable
- [ ] Current IRS Identity Protection PIN letters for anyone listed on the return
- [ ] If a prior return is unavailable, the prior-year California refund or balance paid
- [ ] Any IRS or California Franchise Tax Board notices

COMMONLY FORGOTTEN

Marketplace Form 1095-A; childcare provider tax ID; closing or refinance statement; estimated-tax payments; IRS Identity Protection PIN.

NOTES FOR YOUR TAX PREPARER