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 taxpayer, spouse, and dependents.
  
   Note: In-Person VITA and GetYourRefund require you to provide physical cards.

☐ 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.

☐ Bank Information for Direct Deposit - Account and Routing Number (can be found on a check).

☐ Form 1098-T if tuition was paid to an educational institution, or if a scholarship was received.

☐ Last year’s tax return (if you have it).

☐ If self-employed: Business expenses and mileage.

☐ 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).

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.

Sign up for tax news and updates by texting “TAXES” to 211-211