TAX PREPARATION CHECKLIST

For more information, visit:
MyFreeTaxes.org

These are the most commonly-used documents and information you'll need to complete your taxes using any of our free filing methods.

- SSN/ITIN and birthdates for self and any spouse and/or dependents included on the return.
    - ***Note:*** *Our Prepare Taxes for Me In Person option requires the physical SSN/ITIN; our Prepare Taxes for Me Online option requires a photo of the original SSN/ITIN.*
- Government Issued ID for Taxpayer and Spouse (unless you are self-filing).
- Income documents for self and spouse (ex: Form W-2, 1099, self-employment income, cash).
- 1095-A if you are insured by Covered CA or received a credit from the HealthCare.gov marketplace.
- Bank information for direct deposit: Account and routing number (can be found on a check).
- Last year's tax return (if you have it).
- Identity Protection PIN (IP PIN): If you requested an IP PIN or the IRS assigned one to you.
- If self-employed: Business expenses and mileage (use our Schedule C Worksheet).
- **If using either of our Prepare Taxes for Me options (in-person or online):** Intake Form 13614-C.
- **If using our Prepare my own taxes option (self-filing):** Your prior-year Adjusted Gross Income (AGI) found on line 11 of Form 1040.
- Access to smartphone, tablet, or computer AND a printer, if filing virtually.
- Any other tax forms you received.

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To help maximize your refund, we also recommend collecting:

- College students: Form 1098-T (if tuition was paid to an educational institution or if a scholarship was received) **and** all qualified education expenses (ex: course-related books, supplies, and equipment).
- Child or dependent care expenses:
  Name, address, tax ID of provider (SSN, ITIN, or EIN), and amounts paid.
- Renters: Number of months rent was paid during the tax year.
  To be eligible, rent must have been paid in CA for at least half the year.
- Retirement/IRA: Amount contributed to an Individual Retirement Account (IRA) that was not deducted from your wages by your employer (total value of IRA not needed).
- Foster Youth: Foster youth verification letter.

If you are itemizing your deductions, we also recommend that you collect:

- Charitable donations: List of contributions and amounts, receipts for donations over $250.
- Out-of-pocket medical and dental expenses.
- DMV registration bill.
- Teachers (K-12): Out-of-pocket expenses for classroom materials (ex: books, professional development courses, computer equipment).
- Homeowners: Mortgage interest statement (Form 1098) and property taxes paid.

Note: This is not a complete list of documents that may be required or beneficial for your return–just some of the most common ones.

Sign up for tax news and updates by texting "TAXES" to 211-211.

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