



## **PERSONAL INFORMATION**

All taxpayers will need the following to do their taxes

- Your Social Security number (SSN), ITIN, or tax ID number
- Your Spouses full name (as listed on the social security card), SSN, or ITIN, date of birth
- Stimulus payment information – form 1444
- Identity Protection PIN – only if the IRS has issued one to you, your spouse, or any of your dependents
- Banking Information (only if you would like to receive your refund by Direct Deposit or if you plan on paying your amount due to the IRS) – bank routing number, account number. Your ATM/debit card number will not work

## **DEPENDENT(S) INFORMATION**

All dependent's that have lived with you at least 6 months out of the year

- Dependent(s) information - full name (as listed on the social security card), SSN, or ITIN, date of birth, relation to the dependent (son, daughter, grandchild, parent, etc)
- School aged children – school student profile record
  - Children under the age of 5 if not attending school should bring in a copy of immunization record or record from a local doctor
- Childcare records – including the child care provider's SSN, EIN, or TIN
- Any income of dependent's (even if the dependent is a minor)
- Form 8332 (if applicable) custodial parent releasing their right to claim the child to you, if you share custody of the child with a non-spouse

## **WAGE INFORMATION**

- W2(s)
- 1099 G – Unemployment payments
- 1099 M – Miscellaneous wages that were paid in cash/check
- 1099 R – pension/IRA/annuity income



- 1099 SSA – Social Security income
- 1099 INT – interest income
- 1099 DIV – income from dividends
- 1099 HSA – Health Savings Account
- W2G – Gambling Income
- 1099 C – Debt cancellation
- Jury Duty Pay
- Hobby income and expenses
- Prizes/awards
- Income from a Trust
- State (FTB) tax refund

#### **SELF EMPLOYED**

- Forms 1099M or income records that will be reported as Gross Income
- Records of all business expenses
  - Advertising
  - Car/truck expenses including mileage
  - Commissions and fees
  - Legal and professional services
  - Office expenses
  - Rent
  - Repairs and maintenance
  - Business supplies
  - Taxes and licenses paid
  - Travel expenses
    - Meals
    - Travel (such as air, bus, uber)
  - Utilities
  - Cost of goods
    - Materials and supplies
  - Cell phone service
  - Internet service
  - Car insurance
  - Uniforms or work clothing
  - Donations to charity/church



- Tools or equipment

## **RENTAL INCOME**

- Records of income and expenses
  - Monthly rent
  - Number of days the property was rented
  - Advertising
  - Auto and travel to/from the property
  - Cleaning and maintenance
  - Insurance
  - Legal and professional services
  - Management fees
  - Mortgage interest paid to banks
  - Repairs
  - Supplies
  - Property taxes
  - Utilities

## **OTHER TYPES OF DEDUCTIONS**

### **Home Ownership**

- 1098 or mortgage interest statements
- Real estate and personal property tax payment records

### **Charitable donations**

- Any non-profit charitable organization
- Non-cash donations

### **Educational expenses**

- 1098T from any educational institutions
- Itemized qualified educational expenses
- 1098E Student loan interest payments



### **Educator expense**

- Itemized qualified classroom expenses up to \$250

### **Childcare expenses**

- Itemized statement of fees paid to a licensed day care center
- Amounts paid to a baby-sitter or child care provider to your child under the age of 13 while away working

### **W7 – ITIN Application or Renewal**

If you would like to apply for or renew your or your dependent's ITIN

- Full name as listed on the Identification Card, passport, or Consulate ID Card, or previously issued ITIN document
- Date of birth
- Date you first entered the United States
- Original Passport (must be mailed to Department of Immigration) -or-
- Consulate ID card -and-
- Original birth certificate