

What to bring when you file your taxes.



Gathering ALL your tax documents ensures an accurate return and fast refund.

It is required that you bring all the following tax-related documents to your tax appointment:

- All taxpayers must be present with photo identification.
- Social Security cards or Individual Tax Identification Number (ITIN) letters for all the people you list on your return.
- Copies of last year's federal and state tax returns.
- Birthdates for all the people you list on your return.
- All income statements, such as Forms W-2 and 1099, Social Security and unemployment compensation, as well as other statements such as pensions, stocks, interest, and any documents showing taxes withheld.
- If you are self-employed or make cash, collect records of all your income and expenses.
- All records of other expenses such as tuition, student loan interest, mortgage interest, or real estate taxes on Form 1098.
- If you purchased insurance coverage through Covered CA, Form 1095-A Health Insurance Marketplace Statement.
- Identity theft PIN issued by the IRS.
- Bank routing numbers and account numbers to direct deposit any refund.

Forms that WE DO NOT NEED (These are nontaxable):

- Supplemental Security Income (SSI)
- Child Support
- Veterans Benefit
- Life insurance when someone passes
- Settlements not related to a job or employment
- CalFresh or food assistance
- CalWorks or welfare cash assistance from the county
- Inheritance, gifts, or bequests
- Alimony for divorces after 2018
- Money from a scholarship is not taxable. However, if you use the money for room and board, or use it to pay other personal expenses, that portion is normally taxable.
- Health insurance from an employer or county (Forms 1095B and 1095C).

Returns that are considered Out-of-Scope

If any of the following apply, we are not able to assist you:

- Incomes more than \$60,000
- **Married Filing Separately returns** (If you are legally married & file alone - you may be a Married Filing Separate taxpayer - this is out of scope and we will not be able to assist you).
- **Self-employed or cash income with certain deductions:**
- **Taking expenses with no proof (receipts, documented mileage, etc. are required).**
- **Business-related expenses over \$20,000.**
- **Have a loss.**
- **Businesses with employees, inventory, or business property.**
- **Returns for companies and/or businesses.**

Self-employed taxpayers may benefit from seeing a paid preparer take deductions with no proof or cannot substantiate. The free program follows guidelines set by the IRS.

More Returns that are Out-of-Scope

- Canceled debt income (Forms 1099C and 1099A) for foreclosures or short sales.
- Handwritten tax documents (W-2, 1099, 1098, etc.).
- Returns for visitors, such as "F," "J," "M," or "Q" visas, that require a 1040NR tax return.
- Rental Income or income from Airbnb.
- Foreign Income.
- Royalty Income.
- Partnership or income from an LLC (Form K-1).
- Sale of cryptocurrencies. Please, see a paid preparer.
- Sale of stocks with more than 20 sales. Please, see a paid preparer.