

Note: IF YOU ARE NEW, Please bring a copy of your previous years tax return along with your current tax documents, W-2's 1099's and other various income statmentes (I.E. Interest, Dividens, Unemployment, Rental, and other miscellaneous income statements.)

Auto License Fee \$ _____

Donations

Church/Temple \$ _____
 Charity \$ _____
 Non-cash contributions \$ _____

Medical Expenses

Prescriptions: \$ _____
 Hospitals: \$ _____
 Doctors: \$ _____
 Insurance premiums: \$ _____
 Misc. \$ _____
 Total Medical Expenses \$ _____

House Expenses

Real Estate Taxes: \$ _____
 Mortgage Interest: 1st \$ _____
 Mortgage Interest: 2st \$ _____
 Total Mortgage Interest \$ _____

Dependent Care Expense \$ _____

(For Children 13 & Under)

Name of Provider _____
 Address _____
 City, State, Zip Code _____
 Phone Number _____
 EIN or SSN _____

Did you have Health Insurance Coverage through Covered California?

Provide Form 1095-A & Form 3895

Solar Panel Purchase?

Provide Contract

Hybrid or Electric Car Purchase?

Provide Contract

New Dependent?

Provide SS Card

College Tuition Paid?

Provide Form 1098-T

(Some Schools will have this form in the student portal website)

Were you a Full time or Part Time Student?

Graduate or Under Graduate Courses?

Did you pay any student loan interest?

Provide Form 1098-E

*** If you should qualify for Child Tax Credit and/or Earned Income Credit - we will need a document showing your childs name, and same address as you are you are using in your tax return. The Tax Preparer will let you know if these documents will be required at the time of your appointment

Acceptable Documentations:

- School Data File Print Out
- School Report Card (with your address on it)
- Medical Bill or Statement
- Letter from Doctor's office

If you want to have your refund directly deposited into your account please fill out the following information so we can include the information in your return as well as providing us a voided out check.

Bank Name _____ Account Number _____

Routing Number _____

CHECKING or SAVINGS?

(Please circle one)

