

The Tax Place

ITEMS TO BRING TO YOUR TAX APPOINTMENT

New This Year:

- IRS Letter 6475 – Received in January and shows your Stimulus # 3 amount
- IRS Letter 6419 – Received in January and reports your Advanced Child Tax Credit Received.

INCOME:

- W-2 Forms from all employers
- W-2G Gambling Winnings
- 1099-Misc, 1099-Div, 1099-Int, and any forms reporting income from various sources
- 1099-NEC Income from Non-Employee Contractor work
- 1099-B Sale of Stocks, etc.
- 1099-SSA Social Security Income
- 1099-G Income from state programs such as unemployment, state refunds,
- 1099-C Cancellation of Debt

DEPENDENTS & MISC

- Social Security number and birthdate of all dependents
- Dependent Care Expenses.
 - Provider's Name, Address, Telephone #, Tax ID#, and amount paid
- Form 1098-T College Tuition paid
- Form 1098-E Student Loan Interest paid

BANK INFO FOR DIRECT DEPOSIT OF REFUND OR DIRECT PAY OF TAX DUE:

- Routing and Account number

DEDUCTIONS

- Medical and Dental Expenses – If over 7.5% of your gross income/Includes Mileage
- DMV – Amounts paid for registrations (tax deductible portion)
- Mortgage Interest Paid – Form 1098. First and Second home (some limits apply)
- Property Taxes paid (All properties)
- Charitable Giving – Receipted donations. -Cash/Check Donations. -Goods Donated.
- Sales Contract on purchase of car, truck, boat, motorhome, etc.
- Final escrow settlement or disclosure statement on purchase, sale, or refinance of property. (All properties)
- Any job required supplies/expenses not reimbursed by employer. (Calif deductible)

MEDICAL INSURANCE

- Mandatory for California Residents
- IRS FORM 1095A And CA Form 3895 - If your medical is “Covered California”

LAST YEARS TAX RETURN – If you are a new client

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