

The Tax Place

ITEMS TO BRING TO YOUR TAX APPOINTMENT

INCOME:

- W-2 Forms from all employers. Overtime Employees include last paystub of December.
- W-2G Gambling Winnings
- 1099 Forms Income from different sources
- 1099-NEC Income from Non-Employee Contractor work
- 1099 Forms for Investment income.
 - 1099-DIV Dividends, 1099-Int Interest Income, 1099-B Stock Transactions, 1099-DA Digital Assets Trade or Sales
- 1099 Forms for Social Security, State Refunds, Unemployment, Paid Family Leave
- 1099-C Cancellation of Debt
- 1099K – Payments received from 3rd Party Networks (eBay, Etsy, PayPal, etc.)

DEPENDENTS, EDUCATION & MISC

- Social Security number and birthdate of all dependents
- Dependent Care Expenses
 - Providers Name, Address, Telephone #, Tax ID#, and amount paid
- Form 1098-T College Tuition – Dependents & Taxpayers
- Form 1098-E Student Loan Interest paid

BANK INFO FOR DIRECT DEPOSIT OR DIRECT PAY OF TAX OWED

- Bank Routing and Account number

DEDUCTIONS

- Medical and Dental Expenses – Deductible If over 7.5% of your gross income/Includes Mileage
- DMV – Amounts paid for registrations (tax deductible portion)
- Mortgage Interest and Property Taxes Paid – Form 1098 for all properties
- Charitable Giving – 2 Categories. 1. Cash/Check or Equivalent. 2. Goods (receipted if over \$250)
- Contract on purchase or refinance of car, truck, boat, motorhome, etc.
 - Interest paid YTD on above vehicles
- Final escrow settlement or disclosure statement on purchase, sale or refinance of property
- Any job required supplies/expense not reimbursed by employer. (Calif deductible)
- Energy Efficient Home Improvements – Sales Contract or Paperwork with Manufacturer Info.
- Electric Vehicle and Solar Panel contracts for Federal Tax Credits

MEDICAL INSURANCE

- If your insurance is Covered California/Marketplace then Form 1095-A is mandatory.

LAST YEARS TAX RETURN – If you are a new client

**** Please see our website for other checklists for business, rental property & special occupations.**

Website: www.thetaxplace.us

Client Portal: <https://thetaxplace.smartvault.com>

Office (714) 449-2099

Fax (714) 449-9919

721 East Chapman Avenue, Fullerton, California 92831