

These are the most common documents you'll need to complete your taxes:

- Photo identification** such as valid California driver's license, California state ID, Military ID, or passport for both the taxpayer and spouse if filing a joint return. *Both taxpayer and spouse must be present at appointment.*
 - Birth dates for you, your spouse, and dependents on the tax return.** This information is entered on the IRS [Form 13614-C Intake/Interview and Quality Review Sheet](#) that you can download and complete in advance of your appointment (if possible) or you can complete when you arrive for your appointment.
 - Social Security Number or ITIN Verification for you, your spouse, and all dependents listed on the tax return.**
 - o Social Security Card, Legible photocopies or, FORM SSA-1099 - SOCIAL SECURITY BENEFIT STATEMENT for 2023 are acceptable proof (Last year's tax return can't be used as proof of Social Security numbers). To get a replacement card <https://www.ssa.gov/number-card/replace-card>.
 - o An Individual Taxpayer Identification Number (ITIN) assignment letter may be substituted for you, your spouse, and your dependents if you do not have a Social Security number.
 - Last year's Federal and California tax returns.** If you used a VITA or AARP Tax-Aide service last year, bring the full envelope you received last year.
 - If you want a direct deposit of your refund,** the routing number and account number for your bank account a convenient way to provide this is on a voided check (not always on a deposit slip).
 - Proof of all taxable income: Forms W-2, W-2G, 1099-R, 1099-Misc, SSA-1099, 1099-NEC, 1099-K, etc.** Wage and earning statements from all employers or pension providers. If you received unemployment compensation, bring your **1099-G**.
 - If you are self-employed or operated a small business,** please use the [Schedule C Worksheet](#) to assist you in identifying qualified business deductions.
 - Forms 1099-INT, DIV, 1099-B.** Interest and dividend statements from banks or investment companies. Brokerage statements from investment companies may combine several items on one tax form.
 - Forms 1095-A, 1095-B, or 1095-C** Health Coverage Statements or Health Insurance Exemption Certificate, if received. **All Covered California participants will receive a Form 1095-A. We must have that form to complete your return.**
 - Childcare expenses:** Business Name or individual's name, Address, phone number and Tax ID or Social Security Number of your childcare provider and amounts for each child.
 - Education Expenses and Income: 1098-T** and allowable education expenses.
 - If you are using a Power of Attorney to file a return,** bring the notarized Power of Attorney.
 - If you are filing a return for a deceased taxpayer,** bring death certificate or exact date of death.
 - Itemized vs Standard Deduction-CA Standard Deductions:** MFJ, QSS, HoH= \$10,726; Single, MFS=\$5,636 Individuals whose qualifying deductible expenses are more than their standard deduction should consider itemizing their deductions. See [IRS Pub 17 Tax Guide for Individuals](#) for more information. **If you are itemizing,** please use the [Itemized Deductions Worksheet](#) as an aid for you to track and total your deductible expenses. Some common documents to help you claim deductions are receipts for unreimbursed, allowable medical expenses, medical mileage log, charitable contributions receipts, property tax statements, mortgage interest 1098, and DMV vehicle registration renewal.
- Here are some tips on for itemizing:**
- o Property taxes span the tax year. Use the previous and current tax bills to figure your property tax deduction.
 - o Your entire vehicle registration is not deductible, only the Vehicle License Fee (VLF) is deductible. If you don't have your vehicle registration renewal form, we can look up your VLF from your car registration.
 - o If you made a major purchase such as a car or appliance, bring in the sales taxes paid on that purchase.

Note: This isn't a complete list of documents that may be required or beneficial for your return. If you lost or don't have an item, you can still attend your appointment and we will request any documents that are needed.