**Quick Tax Checklist**

Here is a list of things you may need to give us that are often forgotten:

* **Economic Impact Payments -** please provide amounts received in 2021. IRS letter - Notice 6475 will give you the amount you received. Save this letter and place with your tax documents.
* **Advanced Child Tax Credit Payments –** these began in July 2021 if you have qualified children and did not OPT out of the advance payments. IRS Letter – Notice 6419 should arrive mid-January. Please bring this notice to avoid delays in processing your return.
* **Verify** expiration date of your Driver’s License and verify your direct deposit information.
* **Dependent documentation -** We need something that shows your dependents lived with you in 2020 (For example: Driver’s license, school record, medical record, church record, 1095 proof of medical forms)
* **Proof of Medical Insurance -** We must verify that you & dependents-maintained health insurance for all 2020. CA now has NEW penalties for failure to carry health insurance - Provide 1095-A, B or C forms
* **All Tax Documents –** Received in the mail such as W2s, 1099s, K-1s, 1099-Div/1099-B/1099-Int, HSA, Mortgage 1098, DMV & charitable contributions.
* **IRA Items -** Provide amounts contributed or distributed from IRA or ROTH IRAs. If taking ROTH distributions, we may need basis information
* **Health Savings Account-** Provide 1099-SA for 2020 showing contributions and distributions. To avoid a taxable event, the distributions should have been used for qualified medical expenses.
* **Mortgage Refinance Paperwork -** if you refinanced in 2021 provide Final closing statements (referred to as a HUD – 1 or a Disclosure Statement)
* **Education -** Provide the 1098-T and the school’s account statement showing charges and payments to qualify for education credits.
* **Solar Credit -** Copy of purchase agreement, date installed and in-operation plus any loan Information
* **Rental Property -** List of income & expenses by property- we generally do not need all the receipts. For asset purchases or improvements, we need purchase date, cost, and item description.
* **Mileage -** Those who use their vehicles for business use, provide total mileage for the year and a separate total for business miles.
* **Estimated Tax Payments -** If you pay estimated tax payments, please list each payment amount & date paid for each agency. Provide any agency letters you may have received updating amounts rolled over a previous year.