

# WHAT CLIENTS NEED TO BRING IN

## New Clients

Social Security Cards for everyone on the return  
Birth Certificate for dependents  
Copy of last year's tax return (including depreciation schedules)  
Proof of Insurance for kids (1095A, 1095B, 1095C)

## Basic (Everyone)

ID's/Driver's License  
W-2's  
1099's  
Interest Income  
Any other income

## Paid for Healthcare thru Covered CA?

Form 1095-A

## Do you itemize (usually home owners)?

Medical Expenses  
Property Taxes  
Vehicle Registration fees  
Mortgage Interest -1098  
Charitable Contributions- CASH  
Charitable Contributions- NON-CASH  
Un-reimbursed Job expenses (mileage)

## Do you own a business?

Gross Income  
Inventory, beginning and ending (IF ANY)  
All Expenses, including but not limited to  
    Advertising  
    Legal fees  
    Professional fees  
    Office  
    Supplies  
    Rent  
    Repairs  
    Taxes  
    Licenses  
    Travel expenses  
    Meals & entertainment  
    Utilities  
    Wages  
    Any Other expenses

## Use of home for business\*

Total square footage of home  
Square footage related to business  
\*Use of home is for when you run a daycare or when you have your own business and use part of your home as an office or storage.

## Do you have rental Propertys?

Income (total Rent received)  
Expenses, including but not limited to:  
    Mortgage Interest  
    Insurance  
    Property Taxes  
    Repairs and Maintenance  
    Advertising  
    Management fees (if any)  
    Any other expenses

## Vehicle use (job-related or charitable)

Total miles drive for the tax year  
Miles related to deduction (job or charity)  
Parking and toll fees

## Capital Gains/Losses

Statement showing when bought, including amounts (1099 R) or Year ending statement  
Statement showing when sold, including amounts

## Do you Pay for Daycare?

Name of provider  
Address of provider  
Phone # of provider  
Provider's SS# or EIN#  
Total amount paid for year

## Do you Pay for College?

1098T (*MUST HAVE!*)  
Name of college  
Address of college  
College EIN#  
Total amount paid for tuition?  
Total amount paid for books/supplies?