



TAX PREPARATION CHECKLIST

Prepare Your Documents for the 2025 Tax Season

☐ 1. PERSONAL INFORMATION

Bring all documents below

- ☐ **Valid picture ID.** Original only. No Photocopies.
- ☐ **Taxpayer Identification Number:** Social Security Card, Social Security Number verification letter, or Individual Taxpayer Identification Number (ITIN)

☐ 2. PROOF OF INCOME

Bring all documents that apply

- ☐ **W-2s** for all jobs last year
- ☐ **1099s** for any other income received last year including unemployment income
- ☐ Statements for prizes, scholarships/fellowships, or lottery/gambling winnings

☐ 3. PROOF OF HEALTH INSURANCE

Bring all documents that apply

- ☐ **1095 - A** and California Health Insurance Marketplace Statement, if you had coverage through the Marketplace (Covered California)
- ☐ **1095-B** or **1095-C** if you had other kinds of insurance or coverage

☐ 4. ADDITIONAL ITEMS

Bring all documents that apply

- ☐ **Checking and savings account information** to have your refund directly deposited
- ☐ **Tax return from last year**, if available
- ☐ **Child care expenses:** provider's address, phone #, and federal tax ID #
- ☐ **Homeowners:** 1098 mortgage statement and property tax bill
- ☐ **Education:** 1098-T college tuition and 1098-E student loan statements
- ☐ **Alimony** paid or received - if your divorce was finalized before 2018
- ☐ **Notices:** IRS, state tax, Health Insurance Marketplace, or anything that says "IMPORTANT TAX DOCUMENT"

Ready to file? Call 2-1-1 to make an appointment with an IRS Certified volunteer tax preparer at a location near you.