

☐ 1. PERSONAL INFORMATION (Required to File)

Bring **all** documents below. **No photocopies accepted.**

- ☐ Original picture ID for you and your spouse (if married filing jointly)
- ☐ NOTICE: If married filing jointly, both spouses must be present at appointment.
- ☐ Taxpayer Identification Number for you, your spouse, and all dependents: Social Security Card, Social Security Number verification letter, or Individual Taxpayer Identification Number (ITIN) assignment letter
- ☐ IP PIN (if applicable): IRS Identity Protection PIN notice (CP-01A)

☐ 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 and self-employment income
- ☐ Statements for prizes, scholarships/fellowships, or lottery/gambling winnings
- ☐ Overtime Exemption Documentation
- ☐ Tips Exemption Documentation

☐ 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
- ☐ 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
- ☐ Notices: IRS, Franchise Tax Board (FTB), Health Insurance Marketplace, or anything that says "IMPORTANT TAX DOCUMENT"
- ☐ Vehicle Exemption Documentation

READY TO FILE?

Call 2-1-1 or (888) 600-4357 and select option 7 to be connected directly to a booking specialist.

Hours: Monday-Friday, 8:30 AM-5:00 PM.

Updated on 01/2026