



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