OC FREE TAX PREP $

TAX PREPARATION CHECKLIST

Prepare Your Documents for the Tax Season

☐ 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) (new IP PIN issued **every year**)

☐ 2. PROOF OF INCOME

Bring **all printed** 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

☐ 3. PROOF OF HEALTH INSURANCE

Bring **all printed** 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 printed** 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
- ☐ **Notices:** IRS, Franchise Tax Board (FTB), Health Insurance Marketplace, or anything that says "IMPORTANT TAX DOCUMENT"
- ☐ **Car Loan Interest Deduction:** 1098-VLI vehicle loan interest statement

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 10/2026