

2023 Income Tax Return

1. Family's Personal Information

Relationship	Legal Name		Date of Birth (MM/DD/YYYY)	Tax ID Number (SSN or ITIN)	Occupation	Remarks
	Last	First				
self						

2. Address and Contact Information - **Address Changed?** : Yes No

Address		City / State / ZIP	
Telephone		E.mail	

3. Check List

*** Last Year's Tax Return - Hard Copy or PDF File**

* Did you pay estimated tax to Federal or State during 2023? If any, scribe paid amount and date

=>

* Did you have any health insurance coverage during 2023? if yes, scribe the period

=> Not Covered? OR Full year Covered? OR Covered Months? From(month) thru(month)

* Did you have insurance from Covered California(Obama care) at any time in 2023? Yes No

=> if yes, bring or attach **Form 1095-A(Federal) & Form FTB 3895(California)**, Health Insurance Marketplace Statement

* Bank Information(Routing No & Account No or Void Check) for Direct Deposit or Debit (Tax refund or Owed)

=> Bank Name/ Routing No + Account No :

4. Attachments - Copy or Scanned Documents)

* W2's from each employer you worked for

* All 1099's received

- - 1099-INT for Interest Received
- - 1099-DIV for Dividends received
- - 1099-S for the sale of Real Estate
- - 1099-SSA for Social Security Benefits
- - 1099-R for distributions from pensions, annuities & IRA's
- - 1099-G For Unemployment or Prior Year State Tax Refund
- - 1099-NEC/MISC for Independent Contractor fees

* 1098 - Mortgage & Home Equity Loan Interest paid - Do not need for Standard Deduction

* Total of all medical and dental expenses - Do not need for Standard Deduction

* Total of child or dependent care expenses

* The amount of property tax you paid during the year - Do not need for Standard Deduction

* List of charitable contributions made during the year - Do not need for Standard Deduction

* List of educational and job-related expenses for the year - Do not need for Standard Deduction

* 1098-T (College Tuition), 1098-E(Student Loan Interest)

* A copy of your last car registration notice - Do not need for Standard Deduction

* 1099-B, Purchase and Sale information for Stock or Cryptocurrencies

* etc. : sch K-1 / 1099-K / W-2G (Gambling Win) / Foreign Income & Foreign Tax Paid

** This is a inclusive list and not everything will apply to you. Feel free to call us to find out what you will need to bring.