



REQUIRED DOCUMENTS

It is imperative that we have all documents. Failure to provide all documents will delay the processing of your return. All Earned Income Credit (EIC) taxpayers are required to submit additional documents for the file. Failure to do so could lead to a \$500 fine, per return.

1. W-2's.
2. Social Security Cards for **each** taxpayer **and** dependent.
3. Legible valid copy of driver's license and/or valid CA Identification card. I must have a current copy each year. If I do not have a copy this will delay processing your return!
4. Dependents – I need full names, social security cards, date of birth, relationship, months lived with taxpayer.
5. 1099's, *if applicable*
6. Child Care Information, *if applicable*
(Name of provider/address/phone number/social security number or EIN number/\$\$ paid)
7. 1098 - Mortgage Information, *if applicable*
8. A Copy of prior year's tax return – FEDERAL ONLY – IF NEW CLIENT
9. Education Expenses
10. Vehicle Registration
11. Investment/Retirement Stmt's
12. Charitable Donation
13. Landlord, if they rent (name/address/phone number/rental period)
14. Voided Check if you want Direct Deposit. I cannot except deposit slips. If I do not have a copy of your voided check, then this will delay the processing of your return.
15. Phone number(s) – home/work/cell
16. Email addresses(s) – personal/work