Your Document Checklist

1. Personal information

- Photo ID (driver's license or state ID)
- Social Security cards or ITIN letters for you, your spouse, and dependents, if applicable
- Dates of birth for everyone on the return
- Last year's federal and California tax returns
- Bank routing and account numbers for direct deposit or tax payments
- Your current mailing address and contact information

2. Income forms

- W-2 — wages and salary
- 1099-NEC — freelance or independent contractor income
- 1099-MISC — miscellaneous income
- 1099-K — payment app or third-party network transactions, if applicable
- 1099-INT — bank interest
- 1099-DIV — dividends and investment distributions
- 1099-B — stocks, bonds, and investment sales
- 1099-R — pensions, annuities, and retirement distributions
- SSA-1099 — Social Security benefits
- 1099-G — unemployment compensation or certain government payments
- 1099-S — proceeds from real estate sales
- K-1 — partnership, S corporation, or trust income
- Business income and expense records, if self-employed
- Rental property income and expense records
- Cash income, tips, and other income records

3. Deductions and tax credits

- 1098 — mortgage interest
- Property tax bills and records
- Charitable donation receipts
- Medical and dental expense records, if potentially deductible
- 1098-T — college tuition
- Receipts for eligible education expenses
- 1098-E — student loan interest
- Childcare provider name, address, and tax identification number
- Dependent care expenses
- Records of eligible energy-efficient home improvements or clean energy purchases
- Receipts for other potentially deductible expenses

4. Health insurance and medical coverage

- 1095-A — Marketplace health insurance (important if you had coverage through Covered California or another ACA Marketplace)
- 1095-B or 1095-C, if received or requested by your preparer
- Health Savings Account forms: 1099-SA and 5498-SA, if applicable

5. Retirement and savings

- 5498 — IRA contributions, if available
- 5498-SA — HSA contributions, if applicable
- Records of traditional or Roth IRA contributions
- Records of 401(k), SEP IRA, or other eligible retirement contributions

- Form 8606 or prior-year records of nondeductible IRA contributions, if applicable

6. Self-employment or small business

- Business income statements and receipts
- Business expense receipts and mileage log
- Vehicle expenses and business-use percentage
- Home office measurements and expense records, if applicable
- 1099 forms received from clients
- Estimated federal and California tax payment confirmations
- Prior-year depreciation schedules and asset purchase records
- EIN and business details, if applicable

7. Home, investments, and major life changes

- Home purchase or sale closing statements
- Rental property purchase, sale, and improvement records
- Investment sale statements and cryptocurrency/digital asset transaction records
- Divorce decree or separation documents, if applicable
- Adoption, birth, or dependent custody documents, if applicable
- Records of moving to or from California or working in another state
- Inheritance, gifts, or other significant financial transaction records, if applicable

8. Payments and prior tax information

- IRS estimated tax payment records
- California estimated tax payment records
- Prior-year refund applied to the next year's taxes
- IRS or California tax notices received
- Prior-year carryover information, such as capital losses or charitable contributions
- Extension payment confirmation, if you filed an extension