



H&R Tax Solutions, LLC.

Items Needed to Prepare Your Tax Return

Identification & Basic Information

- Valid California Driver License or Identification Card
- Social Security Cards for taxpayer, spouse, and dependents
- Copy of last year's tax return (new clients only)
- Proof of medical insurance coverage
- Form 1095-A from Covered California (if applicable)

Dependents

- Social Security Card(s)
- Birth Certificate(s) for children under age 17

Direct Deposit Information

- Bank name
- Routing number
- Account number

Homeownership Information

- Form 1098 Mortgage Interest Statement
- Property Taxes Paid during the tax year
- Escrow/HUD-1 closing documents if you purchased or refinanced during the tax year

Education Expenses

- Form 1098-T
- School name, address, phone number, and school's Tax ID Number
- Total amount of education expenses paid



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Self-Employment or Business Owners

- Itemized list of expenses and totals
- Business income records (if applicable)
- Keep all receipts and supporting documents for at least 5 years in case of an IRS or state audit

Unemployment Income

- Form 1099-G (if applicable)

Childcare & Dependent Care Expenses

- Name of childcare provider, daycare center, or individual
- Complete address and phone number
- Employer Identification Number (EIN) or Social Security Number
- Total amount paid during the tax year

Additional Documents That May Apply

- W-2 forms
- 1099 forms
- Retirement income statements
- Social Security income statements
- Investment or brokerage statements
- Rental property income and expenses
- IRS or Franchise Tax Board notices

Need Assistance?

H&R Tax Solutions, LLC - Phone/Text: (562) 378-0468

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