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Tax Preparation List

Please have the following information & documents available to avoid any delays in your tax return processing

Personal Info.



- Social Security cards for you, your spouse & dependents
- Identification Card for you & your spouse
- Birth certificate for your dependents

*** If you are claiming any children under the age of 18 bring their school transcript. For children under the age of 5 provide a medical statement with your child's name & address***

- Bank account number & routing number for your refund Direct Deposit

Income



- W-2 forms for yourself & your spouse from all employers
- 1099-G Unemployment, Paid Family Leave
- 1099-NEC – Independent Contractors
- 1099-R distributions from retirement plans (401K plans)
- 1099-INT, DIV, B Investment and/or interest income
- SSA-1099 Social Security Benefits received

Health Insurance

- 1095-A Health Insurance Marketplace (Covered California)
- 1095-B Health Insurance (Medi-Cal – Medicaid)
- 1095-C Employer Health Insurance Statement

Students Education Credit

- 1098-T Tuition Statement (Tax Form 1098T is available through the student portal)
- 1098-E Student Loan Interest Statement
- Amounts paid for tuition, books, supplies & equipment such as a laptop, printer, tablet, school supplies

Homeowners & Itemized Deductions



- 1098 Mortgage Interest Statement
- Medical, Dental & Vision expenses
- Vehicle license fees paid (DMV fees)
- Energy saving home improvements such as: Solar Panels, exterior doors, windows & skylights, central air conditioners, water heaters, water boilers, gas heat pumps
- Real Estate / Property Taxes
- Charitable Donations
- Qualified Work Expenses

Recent Tax law changes to Maximize your Tax Refund

Tax laws change every year—
but this year brings major
updates. - As tax season kicks
off, it's time to see what new
tax changes apply to you -
**From tax breaks on overtime &
tips to bigger deductions &
credits, these changes &
updates could make a real
difference in your Tax Refund.**



Along with your income
forms such as W-2's & 1099's
**please bring in your last
paycheck stub of 2025 to
ensure you qualify for every
New Tax Credit!**

***Come File with us to see what
new tax changes apply to YOU!
We'll help ensure you get every
dollar you qualify for.***



Enriquez Services

Celebrating 25 Years

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