

610 E. Francis St. Unit 180

Ontario, CA 91761

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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.

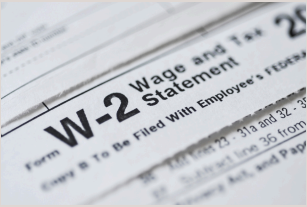


- Social Security cards for you, your spouse & dependents
- Identification Card for you & your spouse
- Birth certificate for your dependents

*** 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

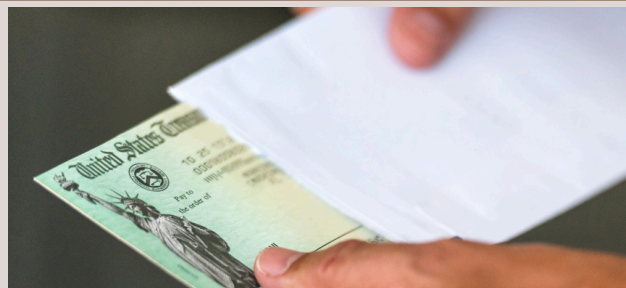
Recent Tax law changes to Maximize your Tax Refund

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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