

What to Bring to your Poway TCE Tax Return Preparation Appointment

- ✓ Photo ID for you and your spouse (if married)
- ✓ For married filing jointly, both spouses must be present
- ✓ Birth dates for you, your spouse and/or dependents
- ✓ Social Security or ITIN cards for you, your spouse and/or dependents
- ✓ A copy of last year's (**TY 2020**) tax returns- Fed & CA. For returning clients, please bring the entire envelope you were provided for your last return.
- ✓ For those claiming Earned Income Credit (EIC) in the last two years, please also bring a copy of your **TY2019** 1040 return.
- ✓ Any TY 2021 W-2 and 1099 forms
- ✓ Any TY 2021 1095 form(s) (Health Coverage)
- ✓ Any TY 2021 full year credit union-bank-broker statements
- ✓ Any TY 2021 cost documentation for any itemization items- unreimbursed medical expenses (must be sorted and

summed by similar items), mortgage interest, car registration bill, property taxes, donations, etc.

✓ Any TY 2021 1098 form(s) (Tuition Statement, Student Loan Interest, if applicable)

✓ Any TY 2021 Health Savings Account (HSA) documentation

✓ For direct deposit of refund or direct debt of tax payment, proof of account and bank's routing number (such as a check from your account)

✓ IRS Letter 6419, 2021 Advance Child Tax Credit, if you received any

✓ IRS Letter 6475, if you received one

✓ Any other TY2021 forms you received indicating income

✓ Any other TY2021 documentation for potential deductions and/or credits