

## 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 2022**) tax returns- Fed & CA. For returning Poway TCE clients, please bring the entire envelope we provided you for your last return.
- ✓ Any TY 2023 W-2 and 1099 forms
- ✓ Any TY 2023 1095 form(s) (Health Coverage)
- ✓ Any TY 2023 full year credit union-bank-broker statements
- ✓ Any TY 2023 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 2023 1098 form(s) (Tuition Statement, Student

Loan Interest, if applicable)

✓ Any TY 2023 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)

✓ Any other TY2023 forms you received indicating income

✓ Any other TY2023 documentation for potential

deductions and/or credits