Poway TCE Tax Return Appointment Checklist

What to bring to your Tax Return Appointment.

- [ ] Photo identification for yourself (and your spouse, if married)
- [ ] If filing jointly, both spouses must be present at the appointment
- [ ] Birth dates for yourself, your spouse, and any dependents (included in driver's licenses or birth certificates, if no driver's license)
- [ ] Social Security cards or ITIN cards for yourself, your spouse, and all dependents
- [ ] Copy of last year's (Tax Year 2024) Federal and California tax returns. Returning Poway TCE clients, bring the White envelope with last year's tax return
- [ ] Tax Preparation Intake/Interview Form (13614-C). Complete as much as you can
- [ ] All W-2 and 1099 tax forms received
- [ ] Any 1095 forms (Health Coverage documentation)
- [ ] Any additional tax forms received from investment brokerages indicating income
- [ ] Unreimbursed medical expenses (sorted and summed by similar items)
- [ ] Mortgage interest statements
- [ ] Car registration bill
- [ ] Property tax receipts (state and local tax maximum limit raised from $10K to $40K)
- [ ] Donation receipts
- [ ] Any 1098 forms (e.g., Tuition Statements, Student Loan Interest, if applicable)
- [ ] Health Savings Account (HSA) documentation
- [ ] Any other documentation for potential deductions and/or tax credits
- [ ] For direct debit or deposit of your taxes or refunds, bring proof of your bank account number and bank routing number (example: check book)
- [ ] If you plan to use the deduction for tips, you will need a document from your employer indicating the amount of tips received.
- [ ] If you plan to itemize including the deduction for car loan interest, you will need to bring your Vehicle Identification Number (VIN).
- [ ] If you plan to use an energy credit, such as for energy efficient doors or windows, you will need to provide the Product Identification Number (PIN) for the items installed.