



ATCAA

Amador Tuolumne
Community Action Agency

People Helping People

TAX INFORMATION CHECKLIST

IDENTITY VERIFICATION

Identity must be verified to begin preparing tax return. Failure to bring this documentation will result in your appointment being rescheduled.

____ Photo ID (both husband and wife if filing a joint return. Acceptable ID includes a State Issued Driver's License. School ID (with a photo), Military ID, VISA or passport, National ID.

____ Valid Social Security Card or ITIN card for every person listed on the tax return. Acceptable substitutes are Form SSA11099 or a Medicare card that includes the letter "A" after the SSN.

____ Bank routing numbers and account numbers for direct deposit or debit. (This is optional)

DID YOU WORK LAST YEAR?

____ Form W-2 ____ Form 1099-NEC ____ Form 1099-G (Unemployment wages)

____ Form W-2G

ARE YOU RETIRED OR NOT IN THE WORKFORCE?

____ Social Security (SSA-1099) or Railroad Retirement Benefits

____ Retirement income or payments from pensions

____ Interest and dividend statements from banks (Form 1099-INT or 1099-DIV).

WERE YOU OR YOUR DEPENDANT ENROLLED IN COLLEGE?

____ Form 1098-T ____ Student Loan Interest form 1098-E ____ Scholarship and College Expenses

DID YOU HAVE OTHER INCOME AND/OR EXPENSES?

____ Mortgage interest Form 1098 ____ Gambling, lottery, or other income

____ Total paid for day care and the day care provider's identifying number.

____ A copy of previous years return if you had a capitol gain or loss carryover (Line item 7 on your IRS return.

____ Medical Insurance from 1095-A, 1095-B or 1095-c. You will need these for your state return.

____ If you have Covered California, you must have a 1095 to begin preparing the return.