



**J & C Tax Services**  
**3400 Bradshaw Rd, Ste A-5**  
**Sacramento, CA 95827**  
**Office (916) 573-4829 Fax (916) 857-9829**

## **Appointment Checklist**

**Note: Not having all your required documents before your appointment could cause a delay in filing your tax return.**

Names, birth dates, social security #'s for yourself, spouse, & dependents if you are not in our system.

Earned income (W-2's and/or 1099-NEC and/or 1099-K)

Pension/Annuity/IRA income (1099-R)

Social Security income (SSA-1099)

Interest income (1099-INT)

Dividend Income (1099-DIV)

Proceeds from broker & barter exchange transactions (1099-B)

Unemployment income/state refund from prior year/taxable grants (1099-G)

Gambling/Lottery/prize winnings (W-2-G)

Income from Corporation, Partnership, Estate, Trust, etc. (K-1)

Records of any other income

Alimony paid/received

Proof of medical insurance (1095-B, 1095-C) (1095-A, covered CA)

Mortgage interest statement (1098)

Mortgage assistance payments (1098-MA)

Taxes paid on mortgage

Charitable contribution receipts (cash & non-cash)

Education expenses (1098-T)

Student loan interest paid (1098-E)

Cancellation of debt (1099-C) **Please fill out the insolvency worksheet to see if you are insolvent**

Child care paid (amount paid, care providers name, address, tax ID #, and phone #)

Bank account information (name of bank, routing #, and account #)

Escrow final settlement statement (if you bought, sold, or refinanced your home during the tax year) Car license fees (if you itemize)

Medical bills (if you itemize) (must be more than 7.5% above your adjusted gross income)

Union Dues (if you itemize) STATE ONLY

Bill of sale (if you bought a boat, automobile, recreational vehicle, or other special item) Employee

business expenses (receipts for items you bought for work) STATE ONLY

Office in home expenses (Please see our office in home worksheet)

Rental income and expenses (Please see our rental property worksheet)

Business income and expenses (Please see our self-employed worksheet or daycare provider worksheet)

Estimated taxes paid during the tax year including January payment (4<sup>th</sup> quarter)

Retirement contributions (401 (k), 403 (b), 457 (g), SEP, Simple, traditional, ROTH IRA, etc.)

**\*\*For more detailed information on what to bring, please fill out our basic questionnaire\*\***

**\*\*Please call us for any questions\*\***