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 number 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**
- ☐ Childcare paid (amount paid, care providers name, address, tax ID #, and phone #)
- ☐ Bank account information (name of bank, routing number, and account number)
- ☐ 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 (4th quarter)
- ☐ Retirement contributions (401 (k), 403 (b), 457 (g), SEP, Simple, traditional, ROTH IRA, etc.)
- ☐ Last paystub (VERY IMPORTANT IF YOU HAVE OVERTIME OR UNION DUES)

****For more detailed information on what to bring, please fill out our basic questionnaire****
****Please call us for any questions****