

Please bring the following to tax site during your appointment:

Required for all:

- (1) Photo ID: Driver's license, passport, student ID, etc.
- (2a) Social Security cards for you, your spouse and any dependents you are claiming on your return. Photo copies or electronic images of social security cards are acceptable.
- (2b) An Individual Taxpayer Identification Number (ITIN) assignment letter may be substituted for you, your spouse, and your dependents if you do not have a Social Security number.
- (3) Bank account routing and account numbers if you would like to receive a direct deposit (a blank check is acceptable).

If applicable to your situation:

- (4) Wage and earning statements (Form W-2, W-2G, 1099-R, 1099-Misc) from all employers.
- (5) Interest and dividend statements from banks or brokerages (Forms 1099).
- (6a) All Forms 1095, Health Insurance Statements.
- (6b) Health Insurance Exemption Certificate, if received.
- (7) Form 1098-T for educational expenses (MyUCLA -> Finances and Jobs -> 1098T).
- (8) Invoices indicating total amount paid for daycare provider and the daycare provider's EIN or SSN.

Recommended:

- (9) Copies of income transcripts from IRS and state.
- (10) A copy of last year's federal and state returns.

Notes for certain situations:

- (1) To file taxes electronically on a married-filing-jointly (MFJ) tax return, both spouses must be present to sign the required forms.