

Prepare for Your Tax Appointment

WHAT TO BRING + WHAT TO ASK



WHAT TO BRING

1. PERSONAL INFORMATION

- ☐ Valid photo ID, SSN or ITIN (for you, spouse, and all dependents)
- ☐ Birth dates for all individuals listed on tax return
- ☐ Copies of last year's tax return
- ☐ Bank account & routing information (for refund or payment)

2. INCOME INFORMATION

- ☐ Wage and earnings statements from previous year (W-2, W-2G, 1099-C, 1099-G, 1099-MISC, 1099-NEC, 1099-R, 1099-S, SSA-1099)
- ☐ Other income: jury duty pay, gambling winnings, HSA reimbursements, scholarships

3. ADJUSTMENTS TO YOUR INCOME

- ☐ 1098-E (student loan interest paid), 1098-T (tuition paid)
- ☐ IRA contributions made during the year
- ☐ Health Savings Account (HSA) contributions

4. ADDITIONAL ITEMS (IF APPLICABLE)

- ☐ Child care provider or camp name, address and federal tax ID #
- ☐ Foreign bank account information
- ☐ Estimated taxes paid throughout the year (if self-employed)
- ☐ Notices: IRS, state tax, or anything that says "IMPORTANT TAX DOCUMENT"



WHAT TO ASK

You're allowed and encouraged to ask your tax preparer questions:

MAKE SURE NOTHING IS MISSED:

"Can you confirm what credits and deductions you checked me for, and which didn't apply?"

UNDERSTAND YOUR TAX OUTCOME:

"What changed from last year, and why?"

KNOW WHAT HAPPENS NEXT:

"Can I review my return before it's filed, and who do I contact later if needed? Will you provide me with a copy of my return?"

1 QUESTION TO ASK:

"Is there anything else about my income, family, education, healthcare, or savings that could qualify me for a credit or reduce what I owe?"



Questions before your appointment?

Connect with MidPen Services staff to help you prepare or connect with free tax assistance.



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Do I Qualify for Any of These Tax Credits?

MANY PEOPLE QUALIFY AND DON'T REALIZE IT

This list can help you ask the right questions when you meet with your tax preparer or explore eligibility online.



TAX CREDITS AVAILABLE

FEDERAL

- | | |
|--|---|
| <input type="checkbox"/> Earned Income Tax Credit (EITC) | <input type="checkbox"/> Lifelong Learning Credit |
| <input type="checkbox"/> Child Tax Credit (CTC) | <input type="checkbox"/> Advance (Premium) Tax Credit |
| <input type="checkbox"/> Credit for other Dependents | <input type="checkbox"/> Saver's Tax Credit |
| <input type="checkbox"/> Child & Dependent Credit | <input type="checkbox"/> Health Coverage Credit |
| <input type="checkbox"/> American Opportunity Credit | <input type="checkbox"/> Credit for the Elderly or the Disabled |

STATE

- | | |
|--|---|
| <input type="checkbox"/> California Earned Income Tax Credit (CalEITC) | <input type="checkbox"/> Young Child Tax Credit (YCTC) |
| | <input type="checkbox"/> California Foster Youth Tax Credit |

TWO WAYS TO FIND OUT IF YOU QUALIFY:



ASK YOUR TAX PREPARER

During your tax appointment, ask:
“Do I qualify for any of these tax credits,
including ones I might now know about?”

Bring this flyer to your tax appointment.



CHECK ELIGIBILITY ONLINE

Trusted tools can help you see what
you may qualify for before filing:

- IRS Interactive Tax Assistant
- Free tax prep sites (VITA/AARP)

Scan QR code to check eligibility:



Have questions?

MidPen Services staff can help you review this list,
use online tools, or prepare questions for your tax
appointment. Connect with your MidPen staff today!



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