

# WHAT IS NEEDED FOR 2021 TAX PREPARATION BY LA CASH

- License or state photo ID; if filing jointly, both need to provide license or state photo ID. If using Scan & Go, both must attend scanning appointment.
- Social Security cards for everyone on the tax return, including dependents.
- Any wage and earning statements *for all jobs* (W-2 forms, 1099s which is similar to a W-2 but used to show someone paid you as a non-employee).
- Lastly, to determine if you are still owed a stimulus payment, provide note the amount of the stimulus payment you received in 2020 and the amount you received in January or February of this year. This is not taxable; the tax preparer just wants to help you determine if more \$ is due to you.

## **There is other info/documents that you may need in order to have your taxes completed.**

- Birth dates for you, spouse, and any dependents.
- Any interest and dividend statements.
- Copies of last year's Federal and State tax returns, if available.
- Do you have a Health Savings Account **OR** purchase health insurance from the Marketplace?  
**IF so, provide Form 1095 that will have been sent to you.**
- For direct deposit of your refund, you'll need your bank or credit union's routing number and your account numbers.
- Was your income in 2020 negatively affected by the pandemic?

**IF YES:** There is a tax break this year called the LOOKBACK Program where you'll likely qualify to use your 2019 income instead of your 2020 income for any child-related tax credits. Please provide your 2019 tax return in case this applies to you.

- Did you pay for Day Care in 2020?

**IF YES:** please provide the following information:

- ✓ Total paid for daycare provider,
- ✓ Daycare provider's tax identifying number (SSN or EIN),
- ✓ Daycare provider's name and address,
- ✓ The 3 digit code if "Quality Child Care Provider."

- Do you own your home?

**IF YES:** provide your mortgage statement and real estate tax bill re: property tax credit.

- Did you pay or receive alimony?

**IF YES:** provide amount of any alimony support paid or received.

- Social Security Benefits? **IF YES,** provide paperwork that shows the breakdown of income.