



**XPCzone Income Tax
Services
2537 W Beverly Blvd 104
Montebello CA 90640**

DOCUMENTS REQUIRED TO PREPARE YOUR INCOME TAX REPORT*

- Any letter or Notice from IRS or State
- The most recent bank statement
- The amounts of Stimulus money received last year and this year.
- State ID or Passport or any Official ID document
- Health Insurance (ex. Medical) form 1095
- If Children you need a Letter from their school that certifies their enrollment on year of the tax
- Social Security Numbers (Original if customer for 1st time) for every member of the family
- or ITIN Number provided by IRS
- Original or copy W2 forms
- Original or copy 1099 Misc. Forms (if any)
- Last Year Income Tax Report
- If own a house 1098 Interest Statement from bank (if any) and Local real estate taxes paid
- Name and SSN of Babysitter (if any)
- Day Care or Education Expenses Documents (if any)
- 1098 T forms from Students College or University (if any)

If you have a Small Business or Self Employed:

- All of the above that applies
- Any letter or notice from IRS
- Any Grant Money Form you Received
- Book of Income and Expenses
- Receipts and Invoices
- Name and SSN of Employees
- Your Federal Employer Number or EIN

QUESTIONS:

CALL NOW: (323) 403-0511