



Cheat Sheet: How to Obtain Documents

1. Tax Returns

- a. Create an account online: <https://www.irs.gov/individuals/get-transcript>
- b. File form 4056 with the IRS requesting a copy be mailed to you.

* For tax refunds, you can search your bank account for the transaction and take a screenshot.

2. Income Verification

- a. This will depend on the source of income; you may need to download paystubs from your employer or provide other income documentation.

3. Vehicles, Boats, Trailers

- a. To obtain a replacement title, download this form and take it to your local DMV office: <https://www.dmv.ca.gov/portal/file/reg-227-pdf/>

4. Financial Accounts (Savings, Checking, Credit Union)

- a. To obtain a copy of your statement:
 - i. Download it online at your bank's website.
 - ii. Visit your local bank branch.
 - iii. Call to request a copy.

5. Investments

- a. To obtain a copy of your statement or policy documents:
 - i. Download it online at your brokerage company's website.
 - ii. Visit your brokerage company's local branch.
 - iii. Call to request a copy.
- b. Look at the attachments to your most recently filed tax returns, you should have a 1099-INT or 1099-DIV statement.

6. Credit Cards

- a. To obtain a copy of your statement:
 - i. Download it online at your lender's website.
 - ii. Call to request a copy.

7. Life Insurance

- a. To obtain a copy of your policy documents:
 - i. Download it online at your insurance company's website.
 - ii. Call to request a copy.

8. Retirement Accounts

- a. To obtain a copy of your statement or policy documents:
 - i. Download it online at your company's website.
 - ii. Call to request a copy.
 - iii. Speak with HR at your company; you can refer to your paystubs to see if you're contributing to a retirement plan.

9. Real Estate

- a. To obtain a copy of the deed:
 - i. Visit <https://www.rivcoacr.org/obtaining-record-copies> for instructions.
- b. To obtain a copy of your mortgage statement:
 - i. Download it online at your lender's website.
 - ii. Call to request a copy.

10. Support Arrears

- a. To obtain a copy of the support order:
 - i. Download it online at: <https://epublic-access.riverside.courts.ca.gov/public-portal/>
 - ii. To obtain a copy of your statement for arrears owed: i. Ask your DCSS case manager (if involved)

11. Business Documents

- a. You may need to provide us with documentation for your outstanding accounts receivable, a business balance sheet, or monthly profit and loss statements for your business. Your accountant should be able to assist you with those documents.

12. Student Loans

- a. To obtain a copy of your Student Loans:
 - i. Download it online at your lender's website.
 - ii. Call to request a copy.