Checklist of Information to Bring to Tax Appointment

The checklist below includes items you need to bring when you visit an AARP Foundation Tax-Aide site so the we can help you prepare your tax return(s).

General Items

- ☐ Prior Year Tax Return(s) ☐ TY2021 ☐ TY2020 ☐ TY2019
- ☐ Government-issued Photo ID for each taxpayer.
- ☐ Social Security cards and/or ITN notices/cards or other official documentation that show the taxpayer identification number for every individual on your tax return.
- ☐ Checking or savings account number and routing number if you want to direct deposit any refund(s) or direct debit any amounts due.
- ☐ Identity Protection PIN (IP PIN) for each individual, if applicable, for the current year.
- ☐ Any correspondence from the IRS.

Income

- ☐ W-2 Wages from each employer
- ☐ 1099-G Unemployment
- ☐ 1099-G State Tax Refund
- ☐ SSA-1099 Social Security
- ☐ RRB-1099 Railroad Retirement
- ☐ 1099-R Pension, Annuity, or IRA Distribution
- ☐ 1099-INT Interest
- ☐ 1099-DIV Dividends
- ☐ 1099-B Brokerage plus documentation showing the original purchase prices if you sold stocks or other assets
- ☐ 1099-C, 1099-A Cancel Debt
- ☐ 1099-NEC
- ☐ 1099-MISC
- ☐ 1099-K Payment Card and Third Party Network Transactions
- ☐ Information about any other income of any form including cash or other than cash
- ☐ W-2G Gambling (and documentation of Gambling Losses)
- ☐ Schedule K-1 Form 1120S
- ☐ Documentation of Alimony Received Year of final decree: __________

Payments

- ☐ Estimated Tax Payment documentation for Federal or State taxes
- ☐ Documentation of Alimony Paid Year of final decree: __________
- ☐ Business Expense documentation: Business Mileage and Other Expenses

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Deductions – Most taxpayers have a choice of taking either a standard deduction of itemizing their deductions. If you have a substantial amount of deductions, you may want to itemize. If so, bring the following information:

- ☐ Summary list of medical/dental/vision expenses including doctor and hospital bills and medical insurance premiums, prescription medicines, assisted living services, long-term insurance and bills for medical related home improvements such as ramps and railings for people with disabilities
- ☐ 1098 form showing home mortgage interest
- ☐ Property tax bills paid during the year (frequently shown on the mortgage statement)
- ☐ Receipts showing sales taxes paid for major purchases such as new vehicles, major home improvement projects, etc.
- ☐ Cash Charity Donation documentation
- ☐ Non-Cash Charity documentation

Health Insurance

- ☐ 1095-A Health Insurance Marketplace Statement

Credits/Adjustments

- ☐ Child or Dependent Care Expense documentation: including name, address, telephone number and employer ID of Social Security number and amount paid to provider
- ☐ 1098-T Tuition Statement **plus** statement of account from the educational institution showing tuition and fees actually paid and scholarships, grants, etc. received. Also bring a summary of any other educational expenses
- ☐ 1098-E Student Loan Interest
- ☐ 1099-SA and F5498-SA for Health Saving Account distributions and contributions
- ☐ IRA / HSA Contribution documentation for out-of-pocket contributions
- ☐ School Expenses for dependents in grades K-12 documentation
- ☐ Educator Expenses (for teachers) documentation
- ☐ Qualified Long-term Care Insurance policy premium payment documentation

Rent Credit or Property Tax Credit

- ☐ Renter CRP
- ☐ Homeowner Property Tax Statement for 2023
- ☐ For Homeowners: Income documentation of non-dependent person(s) living in home
- ☐ Financial Assistance such as: SSI, MFIP, MSA, GA, EA, GRH, DWP documentation
- ☐ Military Retirement Pay / VA Disability Payment documentation