AARP Foundation Tax-Aide Checklist

The below checklist includes items you need to bring when you attend an AARP Foundation Tax-Aide appointment for us to help you prepare your tax return(s). If you file jointly, both parties must be present. If filing as a Power of Attorney (not medical POA), you will need a property/financial Power of Attorney document.

- Last year's tax return(s).
- Social Security cards, other official documentation for yourself and every individual on your return or ITIN assignment letter.
- Photo I.D. required for all taxpayers.
- Checkbook if you want to direct deposit any refund(s).
- Birthdates of taxpayer(s) and/or dependent(s).

Income

- W-2 from each employer.
- Unemployment compensation statements.
- SSA-1099 form showing the total Social Security benefits paid to you for the year, or Form RRB-1099, Tier 1 Railroad Retirement Benefits.
- 1099 forms reporting interest (1099-INT) dividends (1099-DIV), proceeds from sales (1099-B), as well as documentation showing the original purchase price of your sold assets.
- 1099-R form if you received a pension, annuity, or IRA distribution.
- 1099-MISC forms.
- Information about any other forms of Income.
- State or local income tax refunds.

Payments

- All forms and canceled checks indicating federal and state income tax paid (including quarterly estimated tax payments).

Deductions

Most taxpayers have a choice of taking either a standard deductions or itemizing their deductions. If you have a substantial amount of deductions, you may want to itemize. You will need to bring the following information:

- 1098 form showing any home mortgage interest.
- A list of medical/dental expenses (including doctor and hospital bills and medical insurance premiums), a list of prescription medicines, costs of assisted living services, and bills for home improvements such as ramps and railings for people with disabilities.
- Summary of contributions to charity.
- Receipts or canceled checks for all quarterly or other paid tax.
- Property Tax bills and proof of payment.

Health Insurance

- 1095A Forms if you purchased insurance through Marketplace (Exchange).
- 1095B/1095C Forms (if applicable).
- Any exemption correspondence from the Marketplace (if applicable).

Credits/Adjustments

- Dependent care provider information (names, employer ID, or Social Security number).
- 1098-T and 1098-E forms (Tuition and Student loan interest).