

AARP Foundation Tax-Aide

DOCUMENTS WE NEED

The following items are required by law. Your return cannot be prepared without them.

Government-issued photo ID for you (and your spouse if married filing joint)

- Passport main page
- Front and back of driver's license, or military or other government cards

Social Security card or ITIN for every person named on the return

- Front of Social Security card
- Copy of the issuing letter of the ITIN

Please provide a copy of your most recent federal and state (if applicable) tax returns.

The following is a list of additional items needed if they apply to your tax situation. Check your most recent tax return to help you remember if any of the following items will be needed again this year.

Income

W-2s from employer(s)

1099s

- 1099-G for federal, state, and local payments (e.g., state tax refund)
- 1099-G for unemployment benefits (if you did not receive this form, contact your state's unemployment office)
- 1099-INT interest income (reportable, but no form is issued \$10 or less; check your December bank statement or ask your financial institution)
- 1099-DIV dividend income (reportable, but no form is issued \$10 or less; check your December statement or ask your financial institution)
- 1099-OID original issue discount (reportable, but no form is issued \$10 or less; check your December statement or ask your financial institution)
- 1099-R distributions from pensions, annuities, retirement or profit-sharing plans, IRAs, insurance contracts, and the like
- 1099-B or brokerage statement (which would include capital gains information)
- 1099-MISC miscellaneous income (royalties, rents, prizes, awards, medical and health care payments)
- 1099-NEC nonemployee compensation form
- 1099-C cancellation of debt form (for non-business credit card debt only)
- 1099-K payment card and third-party transactions (e.g., for Uber, DoorDash, Grubhub)
- 1099-K- statement of shareholder's income, deductions, and credits
- 1099-Q payments from Qualified Education Programs (under sections 529 and 530 savings plans)
- 1099-SA distributions from an HSA account
- SSA-1099-R Social Security benefit statement
- RRB-1099-R annuities or pensions from the Railroad Retirement Board
- 1099-S proceeds from real estate transactions

W-2G gambling statement

- W-2G forms and the amount of any winnings not reported on a W-2G
- Amount of any losses **if you had gambling winnings**

Information related to self-employment (see the worksheet) and records of all cash income received

State distributions not issued on one of the above forms (e.g., property tax refund)

Other items

1095-A health insurance statement from the Marketplace for any person named on the return

1098-T tuition statement from post-secondary institutions for any person named on the return

- Information regarding education expenses (see the worksheet)

982 Forgiveness of Main Home Mortgage

5498-SA Contributions to an HAS

Information related to itemized deductions (see the worksheet)

Information regarding child or dependent care you paid (include name, address, and EIN/SSN of care provider, as well as the amount paid for each child/dependent)

Information related to alimony you paid or received last year (include name and Social Security number of former spouse)

Property taxes you paid (depending on your state, you may be eligible for a tax credit on your state tax return)

Estimated tax payments you made to the IRS or the state for the tax year we are preparing

Bank information for direct deposit or direct debit (we must have your bank's routing number and your account number; the best source for this information is your bank check or other documentation printed by your financial institution). Direct deposit is the safest – and fastest – way to receive your refund if one is due. Direct debit is the safest way to pay any balance due to the IRS.