

AARP FOUNDATION TAX-AIDE

In order to assist the volunteer counselor in accurately and completely preparing your return, please be sure you have the following documents with you:

Required documents in order to have return started:

- Social Security Cards or comparable documentation for you, your spouse (if applicable) and all others on the return. Picture ID for the taxpayer(s) present when the return is being prepared.
- Income related documents: Forms W2, Unemployment compensation statements, SSA 1099, 1099R, and other 1099 forms, or identification of other income such as self-employment.
- Brokerage statements or other documentation for sale of capital property (e.g. stocks, bonds) showing the cost basis (purchase price) and date purchased for all securities or property sold or transferred during the tax year.
- Expense related documents: Checks and forms showing federal and state taxes paid, 1098 forms showing mortgage interest, documentation of medical, dental, charity, or business expenses, any vehicle and property taxes, and mortgage interest paid.
- Receipts for expenses need to be in reasonable order and legible. Summaries and totals are appreciated and in some cases required.
- Information related to educational expenses (if applicable) including Form 1098-T from the institution, and receipts for other expenses.
- A check with your name printed on it for direct deposit/debit of any refund/balance due. A check in your checkbook is acceptable. A voided check is not required.
- Health insurance coverage information for taxpayer, spouse, and all dependents. Note any monthly coverage if taxpayer doesn't have full-year coverage.
- If taxpayer purchased health insurance through the Marketplace/Exchange, bring Form 1095-A (should receive this form by January 31). Include any health care exemptions received from the IRS or the Marketplace/Exchange.

Other helpful documents to bring:

- Please provide a copy of your last year's tax return. The data on the last year's return is needed to complete the new tax return if you had itemized deductions the previous year, received a state refund, and in other circumstances.
- If you receive a pension or annuity from a former employer, please bring the date that you began to receive payments. (In some cases, this is required.)