

## **Documents to Bring to the Tax-Aide Site**

### **AARP Foundation,**

The checklist below includes items you need to bring when you visit an AARP Foundation Tax-Aide site for us to help you prepare your tax return(s)

- Previous year's tax return(s).
- Social Security cards and/or ITIN notices/cards or other official documentation that show the taxpayer identification numbers for every individual on your return.
- Photo ID for each taxpayer.
- Checkbook 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).

### **Income**

- W-2 from each employer.
- 1099-G form for unemployment compensation or state/local income tax refunds.
- SSA-1099 form showing the total Social Security benefits paid to you for the year, or RRB-1099, Tier 1 Railroad Retirement benefits form.
- 1099 forms (or other statements) reporting interest (1099-INT), dividends (1099-DIV) and/or proceeds from sales (1099-B), plus documentation showing the original purchase prices if you sold stocks or other assets.
- 1099-R form if you received a pension, annuity, or IRA distribution.
- 1099-MISC, 1099-K, or other 1099 forms.
- If you have a business, bring a summary list of all your income (cash and noncash) and all business-related expenses.
- Information about any other income of any form including cash or other than cash.

### **Payments**

Records of any federal and/or state and/or local income tax paid (including quarterly estimated tax payments) if not shown on income documents.

### **Deductions**

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

- 1098 form showing home mortgage interest.
- A 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.
- Summary of cash and noncash contributions to charity.
- Property tax bills paid during the year (frequently shown on mortgage statement).
- Records of unreimbursed business expenses related to your job or expenses related to your investments.

### **Health Insurance**

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

## **Credits**

- Dependent care provider information – name, address, telephone number and employer ID or Social Security number and amount paid to provider.
- 1098-T form for education expenses 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 education expenses.
- 1098-E form for student loan interest.

## **Privacy Information**

AARP Foundation operates the AARP Tax-Aide program under a cooperative agreement with the IRS. To help you complete your tax forms, AARP's trained and IRS-certified volunteers will see personal information that you give them about you and your finances. This information is strictly confidential. We will not share your information with anyone except as necessary to accurately file your tax returns or as otherwise required by law.

AARP Foundation Tax-Aide keeps different types of information about you, and for different periods of time, depending on the services you ask us to provide you.

If you ask us to file your return electronically, we keep your return information temporarily so that we can electronically process your return, ensure acceptance by the IRS and forward your information as required by the IRS, as well as any state taxation authority (state regulations may vary).

Your return information will generally be turned over to the IRS or otherwise disposed of by the end of April of the year in which we file for you. If you are e-filing, we retain aggregate data (such as city, state and ZIP code information, and return information collected at the site level, such as total returns by filing status or total Earned Income Tax Credit payment) for program analysis. This aggregate data do not include names, Social Security numbers or other personally identifiable information about individuals.

We also keep general, personally identifiable information (such as your name, address, birth date, identification numbers and employer address) for use with next year's filing. The personally identifiable information AARP Foundation Tax-Aide keeps for you will be kept confidential and will not be sold, given away or used for commercial purposes.

In all cases, we take reasonable measures to help ensure that only AARP Foundation Tax-Aide staff and volunteers who need access to your information for the purpose of helping with your tax preparation and filing will have such access. We maintain reasonable policies and procedures intended to protect the confidentiality of your information.

If you have any questions about this notice, please contact us at [taxaide@aarp.org](mailto:taxaide@aarp.org).