

AARP TAX DOCUMENT CHECKLIST

You must bring:

- Previous year's tax return(s). ☑ Photo ID for each taxpayer.
- Identity Protection PIN (IP PIN) Letter from the IRS (for each individual if applicable).
- Social Security cards and/or ITIN notices/cards or other official documentation that show the taxpayer identification numbers for every individual on your return.
- Checking or savings account information if you want to direct deposit any refund(s) or direct debit any amounts due.

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 non-cash) 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

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.
- 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.
- 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.

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.
- IRS Letter 6419 (Child Tax Credit)