Checklist of Items to Bring to Tax Appointment

The checklist below includes items you may need to bring when you visit an AARP Foundation Tax-Aide site so the we can help you prepare your tax return(s). You likely will not have many of the forms listed below, this listing is intended to be a tickler list. Nor is this an all-inclusive list; there may be other documents particular to your personal situation that you should bring. If in doubt, bring it!

Please bring all documents in PRINTED hardcopy form! *We CANNOT prepare your tax returns using digital documents on your phone or other electronic device.*

General Items – Photo IDs and Social Security Number documentation are **REQUIRED** before we can begin preparing your tax returns

- ☐ ***REQUIRED*** -- Government-issued **Photo ID for each taxpayer**.
- ☐ ***REQUIRED*** -- **Social Security Number** and/or **ITN** notices/cards or other official documentation that show the taxpayer identification number **for every individual on your tax return**.
- ☐ ***REQUIRED if you expect a Federal refund*** -- Checking or savings account number and routing number documentation (bank statement or your checkbook) for direct deposit of refunds or direct debit any amounts due. Please note – bank deposit slips are NOT satisfactory. *Please be aware that the IRS will no longer mail refund checks – all refunds will be by direct deposit.*
- ☐ If applicable, **IRS issued Identity Protection PIN (IP PIN)** for each individual for the current year. Previous year IP PINs are not acceptable.
- ☐ Any correspondence from the IRS or MN Dept of Revenue.
- ☐ Advance Child Tax Credit letter from MN Dept of Revenue and last year's tax return.
- ☐ Prior Year Tax Return(s) are always helpful ☐ TY2024 ☐ TY2023 ☐ TY2022

Income

- ☐ W-2 Wages from each employer
- ☐ SSA-1099 Social Security
- ☐ RRB-1099 Railroad Retirement
- ☐ 1099-R Pension, Annuity, or IRA Distribution
- ☐ 1099-INT Interest
- ☐ 1099-DIV Dividends
- ☐ 1099-B Brokerage plus documentation showing the original purchase prices if you sold stocks or other assets
- ☐ 1099-C, 1099-A Cancel Debt
- ☐ 1099-G Unemployment
- ☐ 1099-G State Tax Refund
- ☐ 1099-NEC
- ☐ 1099-MISC
- ☐ 1099-K Payment Card and Third Party Network Transactions
- ☐ W-2G Gambling (and documentation of Gambling Losses)
- ☐ Schedule K-1 Form 1041 / Form 1065 / Form 1120-S
- ☐ Documentation of Alimony Received or Paid and year of final decree: ________________
- ☐ Information about any other income of any form including cash or other than cash

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Self-Employment Income and Expenses

- ☐ If you are self-employed (i.e., Uber, Lyft, DoorDash, Handyman, etc.), we may be able to help prepare your taxes. Please download, print, and fill-in this worksheet: **Worksheet – Schedule C Self-Employment**

Payments

- ☐ Documentation of Estimated Tax Payments for Federal and/or State taxes
- ☐ Documentation of Alimony Paid including year of final decree: _________________

Deductions – *Most taxpayers use the Standard Deduction rather than itemizing their deductions. If you typically only utilize the Standard Deduction method, you may want to bring Charitable Donation documents (cash and/or non-cash) if your donations exceeded $500. You do not need to bring any of the other deduction documentation.*

- ☐ Cash Charity Donation documentation
- ☐ Non-Cash Charity documentation (bring detailed records if over $500)
- ☐ If you have (or think you will have) a substantial number of eligible deductions, you may want to itemize your deductions. If so, please download, print, and fill-in this worksheet: **Worksheet – Schedule A Itemized Deductions**

Credits/Adjustments

- ☐ Child or Dependent Care Expense documentation: including name, address, telephone number and employer ID of Social Security number and amount paid to provider
- ☐ 1098-T Tuition Statement **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 educational expenses. Please download, print, and fill-in this worksheet: **Worksheet – Education Credits**
- ☐ 1098-E Student Loan Interest
- ☐ 1099-SA and F5498-SA for Health Saving Account distributions and contributions
- ☐ IRA / HSA Contribution documentation for out-of-pocket contributions
- ☐ School Expenses for dependents in grades K-12 documentation. Please download, print, and fill-in this worksheet: **Worksheet – K-12 Education Expenses**
- ☐ Educator Expenses (for teachers) documentation
- ☐ Qualified Long-term Care Insurance policy premium payment documentation

Health Insurance

- ☐ 1095-A Health Insurance Marketplace Statement

Rent Credit or Property Tax Credit

- ☐ Financial Assistance such as: SSI, MFIP, MSA, GA, EA, GRH, DWP documentation
- ☐ Renter CRP for location you lived at
- ☐ Homeowner Property Tax Statement for 2025
- ☐ For Homeowners with non-dependent person(s) living in home, please download, print, and fill-in this worksheet: **Worksheet – Co-Occupant Income**

NOTE: The worksheets can be downloaded from https://mn1.taxaide.aarpfoundation.org/taxpayer-information/#WhatWeNeedFromYou