

# Important Information to Bring to Your Tax-Aide Appointment

Appointment Date: \_\_\_\_\_

Appointment Time: \_\_\_\_\_

Appointment Location:  
\_\_\_\_\_

Every taxpayer's situation is unique, and thus it is impossible to list all the items one must bring in for a tax appointment for every type of tax situation. The following list is intended to help you identify the most common items to bring in with you for your tax appointment. There may be other documents or data that are important in your situation. When in doubt, bring an item in question to your tax appointment.

Attach this list to a folder of your tax documents, and check items off as you add them to the folder.

## General Information

- Checking or savings account information if you want to direct deposit any refund(s) or direct debit any amounts due. We will need to know the name of bank or credit union, their routing number, and your account number. We need to check this information every year. We can take this from a blank or voided check, but not from a deposit slip.
- Previous year's tax return(s) if you are new to the Tax-Aide site. If you are returning to the exact same AARP site you were at last year, this is not necessary 99% of the time. However, you can never go wrong by always bringing your copy of last year's return with you.

## Personal Information

- Government-issued photo ID for each taxpayer.
- Your social security number or tax ID number (ITIN).
- Acceptable evidence of social security numbers includes original SS cards, letters or other documents from the Social Security Administration with the complete SS number on them, older Medicare cards with the SS number ending with an "-A", or the presence of the taxpayer's previous year's tax return in the computers of the tax site he is attending, which would be true if he used that exact site the previous year.
- Your spouse's and dependents' full names and social security numbers or tax ID numbers.
- If applicable, Identity Protection PIN (IP PIN). The IRS IP PIN is a 6-digit number assigned to eligible taxpayers to help prevent the misuse of their Social Security number on fraudulent federal income tax returns.

**NOTE:** If you are married and will be electronically filing a joint return, both spouses must be present to sign the required forms.

## Dependent(s) Information

- Date of birth and social security number or tax ID number for each dependent.
- If applicable, Form 8332 showing that the child's custodial parent is releasing their right to claim a child to you, the noncustodial parent.

## Health Insurance Information

- Marketplace exemption certificate (ECN) if you applied for and received an exemption from the Marketplace (Exchange).
- Form 1095-A if you purchased insurance through the Marketplace (Exchange). Forms 1095-B and/or 1095-C if you had insurance coverage through any other source (e.g., an employer, insurance company, or government health plan such as Medicare, Medicaid, CHIP, TRICARE, VA, etc).

# Important Information to Bring to Your Tax-Aide Appointment

## Income Information

### Employment

- Forms W-2

### Unemployment

- Form 1099-G for Unemployment

### Self-Employment

- Forms 1099-MISC, 1099-K, or other 1099 forms
- Income records to verify amounts not reported on 1099s
- Records of all expenses — check registers or credit card statements, and receipts
- Record of estimated tax payments made (Form 1040-ES)

### Retirement

- Forms 1099-SSA and/or RRB-1099 for Social Security or RRB income
- Forms 1099-R for Pension, IRA, and/or Annuity income
- Traditional IRA basis (i.e., amounts you contributed to the IRA that were already taxed)

### Interest, Dividends, and Investments

- Forms 1099-INT, 1099-DIV, 1099-OID
- Forms 1099-B, 1099-S for income from sales of stock or other property
- Dates of acquisition and records of your cost or other basis in property you sold (if basis is not reported on 1099-B)
- Expenses related to your investments

### Other Income and Losses

- Form 1099-G for State Tax Refund
- Forms 1099-SA, 1099-LTC for Health Savings Account and Long-term Care Reimbursements
- Form W-2G Gambling income (as well as expense records)
- Jury duty records
- Hobby income and expenses (although this is Out-Of-Scope for Tax-Aide preparers)
- Prizes and awards
- Trusts
- Royalty Income 1099-Misc.
- Any other 1099s received
- Alimony received — we will need to know the date that the divorce decree was issued and the amount of alimony received
- Forms of all governmental assistance and payments—Social Security, SSDI, Supplemental Security Income, GA, MSA, Veterans Benefits, and Housing Support (GRH)

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## Payments Information

- If you made estimated tax payments (Form 1040-ES), we will need to know the dates and amounts paid of all federal and state estimated tax payments.
- Alimony paid — if you paid a former spouse alimony, we will need to know the date that the divorce decree was issued, the amount of alimony paid during the tax year, and the SSN of the former spouse.

## Deduction Information

For most taxpayers it is more advantageous to take the standard deduction. However, if you have a substantial amount of deductions, you may want to itemize. If so, bring the following information well organized with totals calculated where appropriate:

### Charitable Donations

- Cash amounts donated to houses of worship, schools, other charitable organizations (do not include cost of raffle tickets)
- Records of non-cash charitable donations
- Amount of miles driven for charitable purposes

### Medical Expenses

- Amounts paid for healthcare insurance
- Amounts paid to doctors, dentists, hospitals
- Amounts paid for prescriptions and prescribed medical devices
- Amounts paid for medical related home improvements such as ramps and railings for people with disabilities
- Amounts paid for long-term care insurance
- Amount of miles driven for medical purposes

### Home Ownership

- Forms 1098 or other mortgage interest statements
- Real estate and personal property tax records
- All other 1098 series forms

### State and Local Taxes

- Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax paid
- Invoice showing amount of vehicle sales tax paid if you purchased a new vehicle
- Vehicle license renewal statements

# Important Information to Bring to Your Tax-Aide Appointment

## Credits/Adjustments Information

### Childcare Expenses

- Dependent care provider information – name, address, telephone number and employer ID or Social Security Number and amount paid to provider for each child.

### Educational Expenses

- Receipts that itemize qualified K-12 educational expenses
- Forms 1098-T from educational institutions
- Statement of Account from the educational institution showing tuition and fees actually paid and records of any scholarships or fellowships you received. Include records/receipts of qualified educational expenses.
- Form 1098-E if you paid student loan interest

### K-12 Educator Expenses

- Receipts for classroom expenses (for educators in grades K-12)

### Retirement and Other Savings

- Form 5498-SA showing HSA contributions
- Form 5498 showing IRA contributions
- All other 5498 series forms (5498-QA, 5498-ESA)

## Property Tax Refund Information

### If you were a Renter in 2019

- Certificate of Rent Paid (CRP) for each rental unit you lived in during 2019.
- A summary of the amount and type/source of non-taxable income that you and/or your spouse receive. Do NOT include dependent's income or benefits that are provided directly to them.

### If you were a Homeowner in 2019 and were living in the home on January 2, 2020

- County Property Tax Statement for 2020 (usually issued in mid to late March 2020).
- A summary of the amount and type/source of non-taxable income that you and/or your spouse receive. Do NOT include dependent's income or benefits that are provided directly to them.
- Provide the following information for each individual living in your home who is NOT your:
  - Tenant (pays you rent), or
  - Dependent, or
  - Parent or spouse's parent (unless that parent is a co-owner of the home and lives with you).

Information is required only for the time during the year that they lived in your home:

- Federal Adjusted Gross Income (AGI)
- Non-Taxable Social Security and/or Railroad Retirement Board benefits not included in income
- Deduction for contribution to a retirement plan
- Total payments from programs including MFIP, MSA, SSI, GA, and Housing Support
- Additional non-taxable income (examples include ROTH distributions, scholarships, non-taxed gain from sale of home)