To Have Your Taxes Done by AARP TaxAide You Must:

1. **Make one appointment for every return you want us to prepare** (children's, prior year, etc.)
2. **Bring Last Year's tax return, Picture ID, Social Security cards for yourself and all dependents.**
3. **Arrive at least 15 to 20 minutes early** to sign in and complete necessary paperwork.
4. **Direct deposit** will only be made with a **blank check** to verify routing and account numbers.
5. Bring **Property Tax Bills**: Summer and Winter for the Property Tax Credit (if you qualify)
6. Bring **Utility bill** showing your gas use for the year if you qualify for the energy credit (usually totals are listed in Nov. or Dec. gas bill)
7. Bring **health care documentation**: Medicare (usually on your Social Security 1099SA), employer coverage or Affordable Health Care
8. If filing joint, **both taxpayers must come to the appointment**.
9. Guardians must have paperwork to document their guardianship

Things that will help speed the process of preparing your return

- **Take information out of envelopes and open folded pieces of paper**. Multi-page Brokerage 1099's OK to leave in envelopes.
- **Organize your paperwork** into Income (Examples: 1099SA, W2, Interest) and Everything Else

What to Bring Checklist:

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).

- ☐ Last year's tax return(s).
- ☐ Social Security cards or other official documentation for yourself and every individual on your return.
- ☐ Photo I.D. required for all taxpayers.
- ☐ Checkbook if you want to direct deposit any refund(s).

Income

- ☐ W-2 from each employer.
- ☐ Unemployment compensation statements.
- ☐ SSA-1099 form showing the total Social Security benefits paid to you for the year, or Form RRB-1099, Tier 1 Railroad Retirement benefits.
- ☐ 1099 forms reporting interest (1099-INT), dividends (1099-DIV), proceeds from sales (1099-B), as well as documentation showing the original purchase price of your sold assets.
- ☐ 1099-R form if you received a pension, annuity, or IRA distrubution.
- ☐ 1099-MISC forms.
- ☐ Information about any other forms of Income.
- ☐ State or local income tax refunds.

Payments

- ☐ All forms and canceled checks indicating federal and state income tax paid (including quarterly estimated tax payments).

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. You will need to bring the following information:

- ☐ 1098 form showing any home mortgage interest.
- ☐ A list of medical/dental expenses (including doctor and hospital bills and medical insurance premiums), a list of prescription medicines, costs of assisted living services, and bills for home improvements such as ramps and railings for people with disabilities.
- ☐ Summary of contributions to charity.
- ☐ Receipts or canceled checks for all quarterly or other paid tax.
- ☐ Property Tax bills and proof of payment.

Health Insurance

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

Credits/Adjustments

- ☐ Dependent care provider information (name, employer ID, or Social Security number).
- ☐ 1098-T and 1098-E forms (Tuition and Student loan interest).