

AARP FOUNDATION TAX-AIDE TAX PREPARATION

List of Tax Documents

- Government-issued photo ID** for all taxpayers on the tax return
- Social Security card for everyone included in the tax return**
- Completed Intake/Interview & Quality Review Booklet (form is available on our website)
- Identity Protection Pin issued by the IRS (a new number is issued each year)
- Marketplace Insurance - Form 1095-A **Form can be found on www.Healthcare.gov**
- Your most recent Federal and NC tax returns
- Social Security – Form 1099-SSA
- Wages / Salary from employment - W-2
- IRA, Pensions, Annuities - Form 1099-R
- Interest and Dividends - Form 1099-INT / 1099-DIV, Brokerage Statements
- Capital gains information - Brokerage statements
- Unemployment, government payments - Form 1099-G
- Form 1099-Misc
- Form 1099-NEC
- Self-employment income and expenses (self-employment worksheet is available on our website)
- Sale of House -Form 1099-S
- Alimony paid or received in 2024
- Child or dependent care you paid
- Amount of any gambling winnings for the tax year – Form 1099-G
- Cancellation of Debt -Form 1099-C
- Tuition expenses / scholarships - Form 1098-T
- Energy credits – Please see www.energystar.gov for eligible products. Please make sure you have the model number, parts and labor costs listed separately. Please note clean energy including solar items are out of scope
- Estimated tax payments you made to the IRS of NC Department of Revenue
- A check or bank account routing and account numbers for direct deposit (this is the fastest and safest way to receive your refund)
- Any other tax documents you receive that are not listed here.