

## **AARP FOUNDATION TAX-AIDE TAX PREPARATION**

### **List of Tax Documents**

- ☐ **Government-issued photo ID**
- ☐ **Social Security cards for everyone included in the tax return**
- ☐ **Bank information – Routing & Bank account numbers**
- ☐ **Last year's tax returns**
- ☐ **Completed Intake/Interview & Quality Review Booklet (form available on website)**
- ☐ Identity Protection Pin issued by the IRS (a new number is issued each year)
- ☐ Marketplace Insurance - Form 1095-A
- ☐ Wages from employment - W-2
- ☐ Unreported tips (tips not reported on your W-2)
- ☐ Overtime amounts and rate (included within your reported W-2 earnings)
- ☐ IRA, Pensions, Annuities - Form 1099-R
- ☐ Social Security – Form 1099-SSA
- ☐ Unemployment, government payments - Form 1099-G
- ☐ Interest and Dividends - Form 1099-INT / 1099-DIV, Brokerage Statements
- ☐ Capital gains information - Brokerage statements
- ☐ Alimony paid or received in 2025
- ☐ Amount of any gambling winnings for the tax year – Form 1099-G
- ☐ Form 1099-K
- ☐ Form 1099-Misc
- ☐ Form 1099-NEC
- ☐ Self-employment income and expenses (complete self-employment worksheet located on website)
- ☐ Other income items (jury duty, etc)
- ☐ Student loan interest
- ☐ Child or dependent care you paid
- ☐ Tuition expenses / scholarships - Form 1098-T
- ☐ New Vehicle purchase in 2025 – Vehicle identification number and interest paid
- ☐ Estimated tax payments you made to the IRS of NC Department of Revenue
- ☐ Any other tax documents that are not listed here