

## **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