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 2026
- ❑ 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 2026 – 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