

WHAT TO BRING TO YOUR AARP TAX-AIDE APPOINTMENT

1. **Your last tax return and tax records**
2. **Social security or taxpayer identification numbers for self, spouse, dependents**
3. **Your spouse, if filing a joint return**
4. **A cancelled check or checkbook showing account routing number so that refund can be direct-deposited or taxes due paid electronically on the date you specify, if so desired**
5. **All information received about potentially taxable income, such as:**
 - W-2 (employer's statement of wages paid, etc.)
 - Alimony received
 - 1099-B – Tax information statement from brokerage. Also bring records indicating the purchase dates and prices paid for any stocks sold during the tax year
 - 1099-DIV – income from dividends
 - 1099-G -- unemployment compensation
 - 1099-INT -- interest received
 - 1099-MISC -- non-employee or home business income
 - 1099-R -- distribution from annuity, IRA, pension, etc.
 - SSA-1099-R -- statement showing Social Security benefits received for the year
 - RRB-1099-R -- statement showing Railroad Retirement benefits received for the year
 - K-1 -- only a very simple K-1 on trust income can be handled by Tax-Aide
 - Sale of property, records regarding first-time/existing homebuyer credit, short sales
 - W-2G (gambling winnings)
6. **All information about potentially tax-deductible items, including:**
 - Children, other dependents living with you (have dates of birth, social security numbers)
 - Child and dependent care expenses
 - Child support payments according to legal agreement
 - Student loan interest paid, tuition payments
 - Retirement savings contributions; after-tax pension contributions
 - Real estate tax bill showing parcel number
 - Mortgage interest, points and insurance paid
 - Record of estimated tax payment to state, federal
 - Medical costs that could total more than 7.5% of gross income, including health insurance; long-term care insurance; total paid for prescription medications; out-of-pocket costs for doctors, hospitals, dentists, eye exams and glasses; nursing home costs; mileage traveled for medical care
 - Receipts showing cash donations made to charitable organizations, churches, nonprofit schools, hospitals, medical research organizations; unreimbursed charitable mileage
 - Receipts showing materials donated to charitable organizations
 - Miscellaneous expenditures that, when totaled, might exceed 2% of gross income, including un-reimbursed costs for mileage, tolls, parking fees, uniforms, union dues used for employment; fees paid for tax preparation services, safe deposit box, investment advice
 - Gambling losses to the extent of gambling winnings

AARP TAX-AIDE SERVICES ARE GEARED PRIMARILY TO PERSONS OVER 60, AS WELL AS TO MIDDLE- AND LOWER-INCOME PEOPLE OF ALL AGES. IT IS NOT NECESSARY TO BE A MEMBER OF AARP