

AARP Foundation Tax-Aide - Tax Preparation
Documents We Need to Prepare Your Tax Return

PLEASE NOTE: You MUST provide items (1) and (4); provide items (2) and (3) if they apply. These items are required by law. If you do not provide them, we cannot prepare your return.

Provide all other items that are applicable to you. If you are still waiting for a tax form at the time of your appointment, please call and reschedule.

Look at your last tax return (2020 or 2019) and make certain that you either have a tax form from every person / organization from which you received one in the prior year or know why you do not have that form for the current year.

Item	Form or Document	Description and Notes
Required		
1	Government-issued photo ID for you (and your spouse if married filing joint)	Driver's license, passport, military or other government ID card
2	Front of your Social Security card (and that of your spouse if married filing joint)	Please bring the originals or documentation from the Social Security office, we cannot accept photocopies.
3	Front of the Social Security card OR ITIN number for each all dependents named on your return	ITIN numbers should be supported by an issuing letter
4	IRS Form 14446 signed by you (and your spouse if married filing joint)	Signing this form gives us permission to prepare your return.
Most common		
5	Proof of bank account routing and account numbers for direct deposit (this is the fastest and safest way to receive your refund)	Please provide a voided check or some other documentation with your bank's name, routing number, and your account number. Please do not provide a deposit slip for your account.
6	Any letters or other documentation received from the IRS that mention: (a) any Economic Impact or Recovery Rebate payments you received for 2021 and/or (b) any Advanced Child Tax Credit payments you received during 2021.	
7	Your most recent Federal tax return (2020 if filed, 2019, or 2018 if you have not yet filed for 2019)	Bring the envelope from the last time your return was prepared. It should have your tax returns and supporting documents.
8	Form W-2 - Wages / Salary from employment	One from each employer. These show your wages or salary received and taxes withheld for the year

Item	Form or Document	Description and Notes
9	Form 1099-G – Certain Government Payments - State income tax refunds	
10	Form 1099-G – Certain Government Payments - Unemployment compensation	If you received unemployment benefits in 2021 but did not receive a tax form, contact your State's unemployment office/department
11	Form 1099-INT - Interest Income	You may receive these from your bank, credit union, investment firm, and other sources of interest
12	Form 1099-DIV - Dividends and Distributions	You may receive these from your broker, mutual funds, insurance companies or other sources of dividends.
13	Form 1099-R - Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.	Income distributed from any of these plans. It will also include rollover distributions.
14	Form SSA-1099 - Social Security Benefit Statement	Statement from Social Security Administration showing benefits received in 2021 showing benefits received in 2021. If you do not have this form, you can obtain a copy at your local Social Security office.
15	Form RRB-1099-R - Annuities or Pensions by the Railroad Retirement Board	Retirement or pension income from your or your spouse's railroad retirement.
16	All information related to itemized deductions	Please use the attached Schedule A Worksheet to summarize this information
17	Information regarding child or dependent care you paid	Please provide the name, address, and EIN or Social Security number of the care provider, as well as the amount you paid and for which child or dependent the care was provided
18	Form W-2G - Certain Gambling Winnings	This includes casino, bingo, or lottery winnings for which you received a W-2G
19	Amount of any gambling winnings not reported on Form W-2Gs	This includes casino, bingo, or lottery winnings for which you did not receive a W-2G
20	Amount of any gambling losses for the tax year, if you had gambling winnings	
21	Capital gains information	Brokerage statements, etc., showing your stock, bond, or other investment transactions
22	Form 1098-T - Tuition Statement	You will receive this document from educational institutions attended by you, your spouse, or your dependents

Item	Form or Document	Description and Notes
23	Information regarding education expenses	Please summarize this information on the enclosed Education Worksheet; use a separate sheet for EACH student on your return
24	Information regarding any estimated tax payments you made to the IRS or your State tax agency for 2021	
25	Cancellation of Debt Form 1099-C	For nonbusiness credit card debt ONLY
26	Form 1095-A - Health Insurance Marketplace Statement	If you or anyone on your tax return had medical insurance coverage through the Marketplace, information from your Form 1095-A MUST be included on your tax return.
27	Form 1099-MISC - Miscellaneous Information	Reflects income received from royalties, rents, prizes or awards, or medical and health care payments.
28	Form 1099-NEC - Nonemployee Compensation	Reflects income received for work performed as an independent contractor or for self-employment.
29	Expenses and mileage information related to your self-employment	Please use the enclosed Schedule C Worksheet to summarize these expenses
30	Documentation of all cash income you received	All cash income is reportable and subject to tax; do not include any income you received that is reflected on one of your other tax documents
31	Form 1099-K - Payment Card and Third Party Network Transactions	You may receive this form if you performed for-hire driving services or if you received income through a third-party payment network (you might receive this form if you drove for Uber, Lyft, DoorDash, GrubHub, etc.).
32	Form 1099-S - Proceeds From Real Estate Transactions	You may receive this form if you sold a home, residence, or real estate.
33	Schedule K-1 Form 1120S - Shareholder's Share of Income, Deductions, Credits, etc.	An S corporation will file a copy of Schedule K-1 (Form 1120-S) with the IRS to report your share of the corporation's income, deductions, credits, etc.
34	Information regarding alimony you paid or received in 2020	We will need the name of your former spouse and their Social Security number.
35	Forgiveness of Main Home Mortgage – Form 982	If part or all of your mortgage was forgiven / cancelled, you will have this form from the lender.
36	Form 1099-Q - Payments from Qualified Education Programs (Under Sections 529 and 530)	You will receive this document if you took a distribution from a Qualified Education Program, such as a Section 529 Savings Plan.