

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

PLEASE NOTE: You MUST provide items (1), (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.** Please look at your last tax return (2023 or 2022) and make certain that you either have 2024 tax forms from every person / organization from which you received one in the prior year or know why you do not have that form for 2024. **We do not need originals; we prefer copies**

Item	Form or Document	Description and Notes
Required by Law		
1	Government-issued photo ID for you (and your spouse if married filing jointly) -- front and back, please	Driver's license, passport, military or other government ID card
2	Front of your Social Security card OR ITIN number (and that of your spouse, if married filing jointly)	Copy is OK; or Social Security statement (Form SSA-1099); or last year's return IF prepared by TaxAide ITIN numbers should be supported by an issuing letter
3	Front of the Social Security card OR ITIN number for each of your dependents named on your return	
Most common		
4	Your most recent Federal tax return (2023 if filed, 2022, or 2021 if you have not yet filed for 2023)	Scan the first two pages of the Form 1040 and related Schedules. We do not need copies of your tax forms (i.e. 1099-R or W-2) for the prior year
5	Form W-2 - Wages / Salary from employment	One from each employer. These show your wages or salary received and taxes withheld for the year
6	Form 1099-G - Certain Government Payments - State income tax refunds	Applicable only for state or local income tax refunds. It does not apply to federal tax refunds
7	Form 1099-G - Certain Government Payments - Unemployment compensation	If you received unemployment benefits in 2023 but did not receive a tax form, contact your State's unemployment office/department to obtain this information
8	Form 1099-INT - Interest Income	You may receive these from your bank, credit union, investment firm, and other sources of interest
9	Form 1099-DIV - Dividends and Distributions	You may receive these from your broker, mutual funds, insurance companies or other sources of dividends.
10	Form 1099-R - Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.	Income distributed from any of these plans. This form will also report any roll-over distributions.
11	Form SSA-1099 - Social Security Benefit Statement	Statement from Social Security Administration showing benefits received in 2024
12	Form RRB-1099-R - Annuities or Pensions by the Railroad Retirement Board	Retirement or pension income from you or your spouse's railroad retirement
13	All information related to itemized deductions	If itemizing, prepare the itemizing worksheet
14	Information regarding child or dependent care you paid You must have a letter or receipt from the provider showing the required info	Please provide the name, address, and EIN/SSN of the care provider, as well as the amount you paid and for which child or dependent the care was provided
15	Form W-2G - Certain Gambling Winnings	This includes casino, bingo, or lottery winnings for which you received a W-2G
16	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

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17	Amount of any gambling losses for the tax year, if you had gambling winnings	
18	Capital gains information	1099-B; or a brokerage statement showing your stock, bond, or other investment transactions
19	Form 1098-T - Tuition Statement From educational institutions attended by you, your spouse, or your dependents	
20	Information regarding education expenses	Complete the Educational Credit Worksheet.
21	Proof of bank account routing and account numbers for direct deposit (this is the fastest and safest way to receive your refund) or direct debit (if you owe taxes)	Please provide a voided check or other documentation with your bank's name, routing number, and your account number
22	Information regarding any estimated tax payments you made to the IRS or your State tax agency	
23	Cancellation of Debt Form 1099-C	For nonbusiness credit card and residence debt ONLY
24	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
25	Form 1099-MISC - Miscellaneous Information	Reflects income received from royalties, rents, prizes or awards, or medical and health care payment including most gas/oil royalties
26	Form 1099-NEC - Nonemployee Compensation also complete the self-employment worksheet.	Reflects income received for work performed as an independent contractor or for self-employment
27	Expenses and mileage information related to your self-employment	
28	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
29	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.)
30	Form 1099-S - Proceeds From Real Estate Transactions Complete Sale of Home Worksheet	You may receive this form if you sold a home, residence, or real estate
31	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.
32	Information regarding alimony you paid or received in 2023	We will need the name and Social security number of your former spouse, and date decree was final
33	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
34	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