

## AARP Tax Aide Tax Prep Service

### 2024 Documents to bring to Tax Prep Appointment

<https://www.aarp.org/money/taxes/info-01-2011/important-tax-documents.html>

#### **Bring the following documents to your tax prep appointment:**

1. Government-issued photo ID for each taxpayer
2. Social Security card(s) or other official documentation that show the taxpayer identification numbers for every individual on your return
3. Previous year's tax return [2023]
4. Checking or savings account information if you want to direct deposit any refund(s) or direct debit any amounts due.

#### **Income Documents:**

1. W-2 for each employer
2. 1099-G for unemployment compensation or state/local income tax refunds
3. SSA-1099 showing the total Social Security benefits paid, or RRB-1099, Tier 1 Railroad Retirement benefits form
4. 1099 forms reporting interest (1099-INT), dividends (1099-DIV), and/or Brokerage Statements (1099-B)
5. 1099-R form if you received a pension, annuity, or IRA distribution
6. 1099-MISC, 1099-K, or other 1099 forms
7. IRS letter 6419 detailing any Advance Child Tax Credit received

#### **Payments:**

Federal and/or state and/or local income tax paid (including quarterly estimated tax payments) if not shown on income documents.

#### **Deductions:**

1. 1098 showing home mortgage interest
2. A summary list of medical/dental/vision expenses including doctor and hospital bills and medical insurance premiums, prescription medicines, assisted living services, long-term insurance and bills for medical related home improvements such as ramps and railing for people with disabilities
3. Summary of cash and noncash contributions to charity
4. Property tax bills paid during the year (frequently shown on mortgage statement)

#### **Health Insurance:**

1095-A form if you purchased insurance through the Marketplace (Exchange)