

AARP Foundation Tax-Aide - Tax Preparation  
Documents we need to prepare your return

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1	<b>AARP Foundation Tax-Aide - Tax Preparation</b>		
2	<b>05 - Documents We Need to Prepare your Tax Return</b>		
3	<p><b>PLEASE NOTE: You MUST provide items (1), and (4); provide items (2) and (3) if they apply.</b> These items are <u>required by law</u>; if you do not provide them, we cannot prepare your return. <b>Provide all other items that are applicable to you.</b> Please do not upload your scanned documents to your Customer Portal account unless you have ALL of your 2021 tax documents. Look at your last tax return (2020 or 2019) and make certain that you either have 2021 tax forms from every person / organization from which you received one in prior year or know why you do not have that form for the 2021.</p>		
4	<b>Item</b>	<b>Form or Document</b>	<b>Description and Notes</b>
5	<b>Required</b>		
6	<b>1</b>	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
7	<b>2</b>	Front of your Social Security card (and that of your spouse, if married filing jointly)	
8	<b>3</b>	Front of the Social Security card OR ITIN number for each dependent named on your return	ITIN numbers should be supported by an issuing letter
9	<b>4</b>	IRS Form 14446 signed by you (and your spouse, if married filing jointly)	Signing this form gives us permission to prepare your return
10	<b>Most common</b>		
11	<b>5</b>	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.	
12	<b>6</b>	Your most recent Federal tax return (2020 if filed, 2019, or 2018 if you have not yet filed for 2019)	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
13	<b>7</b>	Form W-2 - Wages / Salary from employment	One from each employer. These show your wages or salary received and taxes withheld for the year
14	<b>8</b>	Form 1099-G – Certain Government Payments - State income tax refunds	
15	<b>9</b>	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
16	<b>10</b>	Form 1099-INT - Interest Income	You may receive these from your bank, credit union, investment firm, and other sources of interest

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17	11	Form 1099-DIV - Dividends and Distributions	You may receive these from your broker, mutual funds, insurance companies or other sources of dividends.
18	12	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 roll over distributions.
19	13	Form SSA-1099 - Social Security Benefit Statement	Statement from Social Security Administration showing benefits received in 2020 showing benefits received in 2020
20	14	Form RRB-1099-R - Annuities or Pensions by the Railroad Retirement Board	Retirement or pension income from your or your spouse's railroad retirement
21	15	All information related to itemized deductions	Please use the attached <i>Schedule A Worksheet</i> to summarize this information
22	16	Information regarding child or dependent care you paid	Please provide the name, address, and EIN of the careprovider, as well as the amount you paid and for which child or dependent the care was provided
23	17	Form W-2G - Certain Gambling Winnings	This includes casino, bingo, or lottery winnings for which you received a W-2G
24	18	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
25	19	Amount of any gambling losses for the tax year, if you had gambling winnings	
26	20	Capital gains information	Brokerage statements, etc., showing your stock, bond, or other investment transactions
27	21	Form 1098-T - Tuition Statement	You will receive this document from educational institutions attended by you, your spouse, or your dependents
28	22	Information regarding education expenses	Please summarize this information on the enclosed <i>Education Worksheet</i> ; use a separate sheet for EACH student on your return
29	23	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
30	24	Information regarding any estimated tax payments you make to the IRS or your State tax agency	
31	25	Cancellation of Debt Form 1099-C	For nonbusiness credit card debt ONLY
32	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
33	27	Form 1099-MISC - Miscellaneous Information	Reflects income received from royalties, rents, prizes or awards, or medical and health care payment
34	28	Form 1099-NEC - Nonemployee Compensation	Reflects income received for work performed as an independent contractor or for self-employment

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35	<b>29</b>	Expenses and mileage information related to your self-employment	Please use the enclosed <i>Schedule C Worksheet</i> to summarize these expenses
36	<b>30</b>	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
37	<b>31</b>	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.)
38	<b>32</b>	Form 1099-S - Proceeds From Real Estate Transactions	You may receive this form if you sold a home, residence, or real estate
39	<b>33</b>	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.
40	<b>34</b>	Information regarding alimony you paid or received in 2020	We will need the name of your former spouse and their Social Security number
41	<b>35</b>	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
42	<b>36</b>	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