

AARP Tax-Aide

Checklist for tax preparation

- | | |
|--------------------------|---|
| <input type="checkbox"/> | Social Security cards for all members of the family or SSR/RRB-1099 |
| <input type="checkbox"/> | Last year's tax return |
| <input type="checkbox"/> | Checkbook if you want direct deposits of any refunds |

Income:

- | | | |
|--------------------------|---|------------|
| <input type="checkbox"/> | Wages | W-2 |
| <input type="checkbox"/> | Social Security | SSR-1099 |
| <input type="checkbox"/> | Railroad Retirement | RRB-1099 |
| <input type="checkbox"/> | Bank/Broker Accounts | |
| <input type="checkbox"/> | Interest | 1099-Int |
| <input type="checkbox"/> | Dividends | 1099-Div |
| <input type="checkbox"/> | Stock Sales | 1099-B |
| | Note: also bring stock purchase records | |
| <input type="checkbox"/> | Pensions | 1099-R |
| <input type="checkbox"/> | Partnership/Trust | K-1 |
| <input type="checkbox"/> | Unemployment | 1099-G |
| <input type="checkbox"/> | State Tax Refund | 1099-G |
| <input type="checkbox"/> | Gambling Winnings | W2-G |
| <input type="checkbox"/> | Other Income | 1099-Misc |
| <input type="checkbox"/> | Debt forgiveness | 1099-A & C |

Credits & Deductions

- | | | |
|--------------------------|---------------------------------------|------------|
| <input type="checkbox"/> | Medical receipts or checks for: | |
| <input type="checkbox"/> | Un-reimbursed medical/dental expenses | |
| <input type="checkbox"/> | Health Insurance | Receipt |
| <input type="checkbox"/> | Eyeglasses/Hearing aids | Receipt |
| <input type="checkbox"/> | Prescription drugs | Receipt |
| <input type="checkbox"/> | Sales tax on new auto purchase | Receipt |
| <input type="checkbox"/> | Property Tax | 1098 |
| <input type="checkbox"/> | State Income Tax | Receipt |
| <input type="checkbox"/> | Mortgage Interest | 1098 |
| <input type="checkbox"/> | Mortgage Insurance | 1098 |
| <input type="checkbox"/> | Charity Donations | Receipt |
| <input type="checkbox"/> | Non-cash estimated value | |
| <input type="checkbox"/> | Misc. job related expenses | Receipt |
| <input type="checkbox"/> | Estimated Federal Tax payments | Check |
| <input type="checkbox"/> | Tuition/Student Loan Interest | 1098-T & E |
| <input type="checkbox"/> | Day Care expenses | Receipt |

This list is for your benefit in preparing your tax return. It is not intended to be a complete list of the records and/or documents needed to complete your individual tax return.