What to Bring to Get Your Tax Return Prepared at an AARP Tax-Aide Site

1. Bring **Photo Identification** for you and your spouse and **Tax Identification** for you, your spouse, and all dependents.
   
   Tax Identification must be one of the following:
   
   (1) Social Security card, or
   (2) ITIN Letter
   (3) Verification letter from the Social Security Admin.

   (We cannot accept (1) Medicare cards, (2) military IDs, (3) last year's tax return, (4) SSA 1099, etc.)

2. **A printed copy of last year's (2017) Federal and NC tax returns and (if available) accompanying tax documents**

3. All "Tax Document" forms received for 2018 tax year
   
   a. Statement of Social Security benefit (SSA-1099)
   b. State tax refund statement (usually on a post card)
   c. W-2 forms from each employer and W-2G (gambling winnings)
   d. 1099 forms: 1099-INT, 1099-DIV, 1099-R (pensions, IRAs, 401Ks), 1099-MISC, 1099-G (unemployment compensation, 1099-S (sale of home), RRB-1099 (railroad retirement), etc.
   e. Form 1095-A, exemption letter/certificate, and any forms related to the Affordable Care Act (Premium Tax Credit or Shared Responsibility Payment). If anyone in your household did not have Medicare or other health insurance coverage, you will also need to bring information on the income of each member of the household
   f. Form 1098-T and documentation on scholarships & **all** education expenses (including who paid which expenses)
   g. Any other papers labeled "Tax Documents" that you received in the mail

4. Interest and/or dividend records not on a 1099

5. All forms and/or records indicating federal & state income taxes paid not already listed, such as estimated tax payments

6. Records on any business or self-employed income and all associated expenses (including non-commuting mileage)

7. If you have sold any stocks, bonds, or mutual funds we need to know how acquired (purchased, received as gift, inherited), **cost, date of purchase**, and the 1099-B brokerage statement (which shows the sale price & date of sale)

8. Child care provider information (name, employer ID/ SSN, address) and record of amounts paid for each child

9. List of charities and amounts donated by check or cash (with receipts) to each. Also, details on non-cash contributions

10. If you expect to itemize deductions (must be more than your **standard deduction**: Single: $12,000, <65, $13,600 - > 65; Married Couple: $24,000 - $26,600; HoH: $18,000-$19,600; Qual Widower: $24,000-$25,300; MFS-$5.), then bring an organized list of deductions (as mortgage interest and insurance, property & vehicle taxes, medical expenses, charitable contributions, non-cash donations etc.). This site has a form available to help you organize your material: "**Itemized Deductions Intake & Client Take Home List**".

11. Any other documents that might affect your tax return, such as student loan interest, alimony, possible energy credits (including past energy credit dates and amounts 2006-2017), repayment of first-time homebuyer credits from 2008 (or 2009 if the home ceased to be the main home within 36 months), gambling winnings/losses, HSA contributions, etc.

12. A blank check (or a legible photo copy of a check) if you would like direct deposit. Will be returned to you.
   (Deposit slips are NOT an acceptable alternative)

13. Both spouses must sign the return at the appointment time.

The AARP Foundation Tax-Aide Program prepares free tax returns for low to moderate income taxpayers, with special attention to those age 60 and older.
SORRY... WE CAN'T PREPARE

- Business Profit & Loss (Schedule C)
  - If EXPENSES exceed $25,000 or ANY NET LOSS
  - IF you do not have accounting & mileage records
  - Other qualifications may apply
- Complicated Capital Gains & Losses (Schedule D) (i.e. futures/options)
- Rental Property (Schedule E) (except land-only rentals)
- Farm Income (Schedule F)
- Schedule K-1
- Military
- Mortgage Assistance Programs
- Minister or other clergy with a parsonage/housing allowance
- Owe any special taxes (alt min or household employment taxes)
- Are due a health coverage credit (Form 1099-H)
- Want to claim home office
- Have loss with bankruptcy
- Want to get adoption credit

ITEMIZED DEDUCTIONS – SCHEDULE ‘A’ CHANGES

Changes:
- Medical: 7.5% of expenses over AGI
- Taxes Paid: Capped at $10,000
- Interest Paid:
- Casualty & Theft Loss:
- Misc. Deductions: NO deduction for Home Equity Loan.

DELETED..........
- Unreimbursed employee expenses
- Job Travel
- Union Dues
- Job education
- Tax Preparation Fees
- Investment Fees
- Safe Deposit Box