

Tax-Aide Suggested Documents

WHEN YOU COME TO HAVE YOUR TAXES PREPARED, PLEASE BRING THE FOLLOWING:

- Social Security cards or other official documentation for yourself and ALL dependents.
- Government-issued picture identification for yourself (and spouse, if applicable)
- A CHECK if you want direct deposit of any refund, or direct debit of balance due. We only need to SEE a check for account verification. We will not keep it. (Deposit tickets not acceptable)
- Copy of last year's income tax return(s)
- W-2 forms from each employer
- Unemployment compensation statements (Form 1099-G)
- SSA-1099 form if you were paid Social Security benefits
- 1099-R Forms (if you received a pension, IRA distribution or annuity from banks, brokerages, civil service or railroad retirement plans)
- 1099-MISC showing any miscellaneous income, including self-employment income
- All 1099 forms (1099-INT, 1099-DIV, 1099-B, etc.) showing interest and/or dividends and documentation showing original purchase price of sold assets
- Consolidated brokerage statements. NOTE: Some of these statements are not sent until March 15. Please arrange your appointment accordingly.
- Form 1098-T from educational institution(s) AND summary of eligible educational expenses paid (course-related books, supplies, equipment)
- A SUMMARY of documented items for itemizing deductions, including property tax bills
- If self-employed: 1099-NEC, 1099-K & 1099-MISC plus SUMMARIES of documented items, cash or other income and expense
- W-2G Gambling Winnings
- All forms indicating federal income tax paid
- Dependent care provider information (name, employer ID, Social Security number)
- Residential energy credit information (amounts paid for qualified insulation, windows, hot water heaters, HVAC units plus energy efficient certification). Solar energy is Out of Scope for Tax-Aide.
- Form 1095-A is required if you are enrolled in a qualified health plan through the Health Insurance Marketplace
- ANY STATEMENT RECEIVED THAT SAID "IMPORTANT TAX INFORMATION"

