

AARP Tax-Aide

Checklist for tax preparation

- Social Security cards for all members of the family or SSR/RRB-1099
- Last year's tax return
- Checkbook if you want direct deposits of any refunds

Income:

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

Credits & Deductions

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