

AARP Foundation Tax-Aide - Tax Preparation
Documents We Need to Prepare Your Tax Return – BRING PRINTED VERSIONS

| Form or Document Required | Description and Notes |
|---------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Govt-issued photo ID for you (and your spouse if married filing joint return) | Driver's license, passport, military, or other government ID card |
| Social Security cards or ITINs for taxpayer(s) and dependents | We can accept SSA-1099 if card not available. An ITIN should be supported by an issuing letter. |
| Proof of bank account routing and account numbers for direct deposit or debit | A voided check or other documentation with your bank name, routing number, and account number. Do not substitute deposit slips. |
| Your most recent Federal tax return | Bring in any IRS Letters received in 2025 as well. |
| Form W-2 - Wages / Salary from employment | One from each employer. These show your wages or salary received and taxes withheld for the year. If Medicaid Waiver Payment, complete a Medicaid Waiver Payment Taxpayer Worksheet available at a Tax-Aide site during open hours or download from our website. |
| Form W-2G - Certain Gambling Winnings and the amount of any gambling winnings not reported on Form W-2G | Bring records of casino, bingo, lottery or other winnings. Complete Taxpayer Gambling Worksheet available at a Tax-Aide site during open hours or download from our website. |
| Form 1099-INT - Interest Income | If you did not receive this from your bank, credit union, or investment firm, bring a year-end bank statement. |
| Form 1099-DIV - Dividends and Distributions | You may receive these from your broker, insurance companies, or other sources of dividends. |
| Form 1099-B – Proceeds from Broker and Barter Exchange Transactions | Income from stock, bond, or other investment transactions |
| Form 1099-G – Certain Government Payments - Unemployment compensation | If necessary, contact the Washington State Employment Security Department. |
| Form 1099-R - Distributions from Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc. | These show Income distributed from any of these plans, including any rollover distributions |
| Form RRB-1099-R - Annuities or Pensions by the Railroad Retirement Board | Retirement or pension income from your or your spouse's railroad retirement |
| Form SSA-1099 - Social Security Benefit Statement | Statement from Social Security Administration showing benefits received in 2025. If necessary, obtain a copy at your local Social Security office. |
| All information related to itemized deductions | Summarize this information on a Schedule A Worksheet available at a Tax-Aide site during open hours or download from our website. |
| Information regarding child or dependent care expenses you paid | Provide the name, address, and EIN or SSN of the care provider, the amount you paid, and for whom the care was paid. |
| Documentation of all cash income you received, not reported on an IRS Form. | All cash income is reportable and subject to tax |
| Information regarding any estimated tax payments you made to the IRS in 2025 | No need for proof of payment. Information comes from bank account transactions or IRS confirmations. |

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| Schedule K-1 – Your share of Income, Deductions, Credits, etc. | Reports your share of income, deductions, credits from Partnerships, Estates, and Trusts |
| Form 1095-A - Health Insurance Marketplace Statement | If any member of your tax household had medical insurance through the Marketplace, information from this form MUST be included on your tax return. |
| Form 1098-T - Tuition Statement and Student account showing expenses | Summarize this information on a Education Credits Worksheet. Complete one for EACH student on your return. Pick up worksheet at a Tax-Aide site or download from our website. |
| Form 1099-A - Forgiveness of Main Home Mortgage | If all or part of your mortgage was forgiven or cancelled, you will have this form from the lender. |
| Form 1099-C - Cancellation of Debt Form | For the discharge of qualified principal residence indebtedness and nonbusiness credit card debt only. |
| Form 1099-K - Payment Card and Third-Party Network Transactions | You may receive this form if you performed for-hire driving services or for income through a third-party network (such as Uber, Lyft or DoorDash) |
| Form 1099-MISC - Miscellaneous Information | Reflects income received from royalties, rents, prizes or awards, or medical and health care payments. |
| Form 1099-NEC - Nonemployee Compensation | Reflects income received for work performed as an independent contractor or for self-employment. |
| Expenses and mileage information related to your self-employment | Complete Schedule C Worksheet to summarize these expenses. Pick up at a Tax-Aide site during open hours or download from our website. |
| Form 1099-Q - Payments from Qualified Education Programs (Sections 529 or 530) | You will receive this document if you took a distribution from a Qualified Education Program, such as a Section 529 Savings Plan. |
| Form 1099-S – Proceeds from Real Estate Transactions | You may receive this form if you sold a home, residence, or real estate. |
| Form 8332 - Release/Revocation of Release of Claim to Exemption for Child by Custodial Parent | This form allows the noncustodial parent to claim an exemption for the child when the parents are divorced. |
| Information regarding alimony you paid or received in 2025 | Bring your former spouse’s SSN if your divorce or separation agreement was executed on or before December 31, 2018, or later modified. |
| Vehicle Identification Number (VIN) and Interest Payment information for any vehicle purchased in 2025 using financing | Interest paid on new vehicle purchases is a deductible expense beginning in 2025. Complete a Qualified Passenger Vehicle Loan Interest Deduction Worksheet available at a Tax Aide site during open hours or download from our website |
| Annual (end-of-year) Account Statement for all Traditional IRA Accounts | If you made Non-Deductible contributions to your IRA and are required to file Form 8606. |
| Energy Efficient Home Improvement projects placed in service in 2025 | You must bring qualified manufacturer identification number (QMID) for all items placed in service in 2025. |
| Qualified Tip Income, Overtime income, Passenger Vehicle Loan Interest | Complete Qualified Tip Deduction Worksheet and/or Qualified Overtime Deduction Worksheet available at a Tax-Aide site during open hours or download from our website. |