**WHAT TO BRING TO AARP TAX APPOINTMENT**

**PERSONAL**

* If married, both husband and wife should be present.
* Proof of identity (photo ID, passport, etc.).
* Social security number (Social Security Card or Benefit Statement-Form SSA-1099) for taxpayer and all dependents.
* Copy of last year’s Federal and state tax returns.
* Personal check, if Direct Deposit refund, with bank checking account & routing no.
* Affordable Care Act documentation – Forms 1095 A, B, or C

 **INCOME**

* W-2 Wage & Tax Statement form from each employer and W-2G Certain Gambling Winnings forms.
* Unemployment compensation statements.
* SSA-1099 Social Security / RRB-1099 Railroad Retirement payments forms.
* All 1099 forms reporting interest (1099-INT), dividends (1099-DIV), proceeds from sales (1099-B) as well as purchase price (cost basis) of sold assets.
* 1099-R forms reporting pension & annuity income and IRA distributions.
* 1099-Misc. form reporting any miscellaneous income.

**DEDUCTIONS AND CREDITS**

* A taxpayer may want to take standard deductions or may itemize deductions:
* Form 1098 Home Mortgage Interest (may also provide Real Estate Taxes paid)
* Contributions to charity documentation
* Real estate and personal property (vehicle) taxes paid
* State income tax refund documentation (if itemized in 2010)
* Health/dental insurance including Medicare B and D payments (on SSA-1099).

**Be sure to organize and total expenses.**

* Capital loss carryover from prior years
* Calendar year local real estate and personal property taxes (regardless if itemizing).
* Child and dependent care provider expenses.
* Qualified education expenses.
* Residential energy credit expenses.

 **PAYMENTS MADE**

Quarterly estimated federal and state taxes paid & prior year’s refund applied