

TAX DOCUMENT SEQUENCE AND INVENTORY

NOTE: Please have all forms removed from envelopes and remove staples if we are scanning the documents.

Note: Please arrange the documents in the order they are listed below.

Items required to bring for Tax Preparation: Bring copies of all documents that apply to your situation plus a copy of the **completed** Intake/Interview & Quality Review Sheet.

- Taxpayer and spouse Social Security cards (copies)
- Dependent(s) Social Security cards (copies)
- Photo ID / Driver's License for Taxpayer and spouse (originals plus copies)
- **Prior year tax return**
- Intake Booklet: complete all pages '**prior to appointment date and time**'.
 - Pages 1 and 2 – Include EMAIL address and good phone #
 - Pages 3 and 4 (custom questions / demographic Info)
 - Pages 6 – 8 (consent forms)
 - Any additional notes or questions list in NOTES
- IRS Form 14446 Taxpayer Consent
- ALL Income:
 - W-2_____
 - 1099-R_____
 - RRB 1099-R_____
 - SSA 1099-SM Social Security_____
 - 1099 Misc or NEC forms_____
 - 1099 Interest (INT) and/or Dividends (DIV)_____
 - Other income items
 - Jury duty pay, gambling winnings, 1099-C_____
 - Unemployment Compensation Form 1099-G box 1_____
 - Capital gains / loss – brokerage statements_____
 - Form 1099-K_____
 - Business Income and Expense documentation (1099-Misc)_____
- INFO for Child Care Credit (statement from Caregiver with name, address, EIN, amount paid for each child.

- Education Credits worksheet all Forms 1098-T_____
 - Student Account Statement_____
- INFO on all Federal and State estimated tax payments_____
- Health Insurance information 1095-A, B, C_____
- Other_____
- Breakdown of deductible expenses: property taxes, charitable contributions, medical
 - _____
- DID YOU Receive a Stimulus (EIP) payment? _____
 - How many/how much (Bring Forms 1444 you received)?_____
- >> **Be sure to provide a VOIDED check if you want DIRECT DEPOSIT**

Due to the COVID pandemic AARP Tax-Aide volunteers must maintain strict safety protocols which prohibit our traditional face-to-face tax preparation service. We must maintain a safe social distance; we can answer questions via phone and / or video conference meetings (if desired).