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’.  
  o Pages 1 and 2 – Include EMAIL address and good phone #  
  o Pages 3 and 4 (custom questions / demographic Info)  
  o Pages 6 – 8 (consent forms)  
  o Any additional notes or questions list in NOTES
- IRS Form 14446 Taxpayer Consent
- ALL Income: 
  o W-2________________________________________
  o 1099-R____________________________________
  o RRB 1099-R________________________________
  o SSA 1099-SM Social Security ____________________
  o 1099 Misc or NEC forms_______________________
  o 1099 Interest (INT) and/or Dividends (DIV)_______________
  o 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____________________________
  o 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  
  o ________________________________________________________________
- DID YOU Receive a Stimulus (EIP) payment?__________________________  
  o 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).