

# IMPORTANT DOCUMENTS TO BRING FOR AARP TAX APPOINTMENT

## 1. PERSONAL INFORMATION

- Valid picture ID** for anyone signing the return
- Taxpayer Identification Number:** Social Security card or ITIN for anyone claimed on the tax return
- Identify Protection Number (IPIN) from IRS** if applicable

## 2. INCOME DOCUMENTS

- W-2** wage information
- W-2G** lottery/gambling winnings
- 1099-INT/DIV** interest or dividend income
- 1099-R** pension or annuity income
- SSA-1099** Social Security Income
- 1099-G** unemployment benefits
- 1099-NEC or 1099-MISC** self-employment income

## 3. HEALTH INSURANCE DOCUMENTS

- 1095-A** health insurance from CA Health Insurance Marketplace (Covered California)
- 1095-B or 1095-C** health insurance coverage

## 4. ADDITIONAL ITEMS

- Prior year tax return**
- Checking & savings account information** for direct deposit
- Child care expenses and provider Information**
- Alimony** paid or received
- 1098-T** college tuition **or 1098-E** student loan statement
- Itemized deductions:** medical expenses, 1098 mortgage statement, property taxes, DMV registrations, & charitable contributions
- Notices** from IRS or Franchise Tax Board