

AARP Tax-Aide

Items to bring with you to have your 2021 Income Tax returns prepared:

BRING PHOTO IDS AND SOCIAL SECURITY CARDS FOR YOURSELF, SPOUSE AND CHILDREN

- Copy of last year's income tax return(s) (2020);
- W-2 forms from each employer;
- Unemployment compensation statements;
- SSA-1099 form if you were paid Social Security benefits;
- All 1099 forms (1099-INT, 1099-DIV, 1099-B, etc.) showing interest and/or dividends and documentation showing original purchase price of sold assets;
- 1099-MISC showing any miscellaneous income;
- 1099-R form if you received a pension or annuity;
- The amount of stimulus payments you received in 2021, either check or debit card (\$1400 per person).
- The amount of advanced child care tax credit you received in 2021.
- All forms indicating federal income tax paid;
- Dependent care provider information (name, employer ID or social security number);
- All receipts or canceled checks if itemizing deductions; Form 1095-A, Health Insurance Marketplace Statement (if 2021 health insurance was purchased on-line);
- Amounts you were billed for heat from 11/1/2020 – 10/31/2021;
- Property tax bills for 2021;
- For State credits, your last auto insurance bill
- Photo ID's and Social Security cards for yourself and all dependents;