AARP Foundation Taxaide Program

Serving Eastern New York

What to bring

Print this page to be sure you have everything you need to for an accurate tax return. Also, review each of your items to assure that you will not need a professional preparer (See: "Can we prepare your return?").

Information summaries

- Intake booklet – A summary of information we need to provide an accurate tax return. **PLEASE PRINT, fill it in**, and bring it with you.
- Self-employed worksheet – **PLEASE PRINT, fill it in**, and bring it with you if you have self employment income.
- Self-employed COVID worksheet – **PLEASE PRINT, fill it in**, and bring it with you if COVID affected your business in 2021.
- Itemized deduction worksheet – **PLEASE PRINT, fill it in**, and bring it with you if you think you have enough deductions to itemize.
- Education credits worksheet – **PLEASE PRINT, fill it in**, and bring it with you if you or a dependent is a post secondary student.
- NY State Intake worksheet – **PLEASE PRINT, fill it in**, for those filing NYS income tax returns

Identification

- Photo ID -Driver's license or state ID preferred – for each taxpayer
- Social Security cards or ITIN numbers and birthdates for all on the return
- Social Security or ITIN number for ex-spouse if receiving or paying alimony or, if married but filing separately
- IRS identity protection PINs (IPPIN) if anyone has one
- A copy of the previous year's return, if possible, for 2021 taxes, also bring 2019's return.
- If a dependent must also file a return, we should do both at the same time.

Income information

- W-2 forms from all employers
- W-2G forms for any gambling winnings and a record of losses if available
- SSA-1099, RRB-1099 social security forms
- SSA-1099-R, RRB-1099-R forms for annuities or pensions. If box 9b has an amount shown, the date of the first annuity payment.
- 1099-MISC forms for oil/gas royalties, miscellaneous jury duty
- 1099-B forms, often included in broker statements (bring ALL broker statement pages)
- 1099-C cancellation of debt(for non-business credit cards only)
- 1099-D forms, often included in brokerage statements

- 1099-G forms from state refunds or unemployment payments
- 1099-INT forms from bank accounts. If interest is under $10, one may not be issued, so bring the amount of interest (it's still taxable)
- 1099-OID forms, often included in broker statements
- 1099-S forms from real estate transactions, if any. If you sold a home bring sales and original purchase document also
- K-1s from oil/gas, partnerships or trusts
- Rental received(only land – all other rentals need professional help)
- Alimony received (and ex-spouse social security number) DIVORCES PRIOR TO 2019 ONLY

Self-employment income

- A summary of cash income
- 1099-K forms showing income payments
- 1099-NEC forms for work done for others
- A list of all expenses related to your business
- Miles driven (actual costs and depreciation need professional assistance)

Deductions

- Medical expenses – please total by hospital, doctors, prescription drugs, dentist, medical equipment, miles driven
- Contributions – Miles driven, please estimate the value of non-cash donations
- 1098 forms showing mortgage interest payments
- 1098-E student loan interest statements
- 1098-T tuition statements
- Scholarship information – amount, restrictions on use of funds
- Details of educational expenses – tuition, books and equipment, how and when paid for (students account printout if possible)
- Registration certificates for all vehicles (the ones with ownership tax shown)
- Sales tax paid on major items (vehicles, boats, appliances)
- Classroom supply expenses for teachers
- Energy efficient home improvements (windows, insulation, furnace, hot water heater)
- Childcare costs – name of providor, address, tax ID, amount paid
- Union dues, unreimbursed business expenses

Other

- 1095-A, B, or C forms to show health insurance coverage
- 1099-LTC forms to document long term care benefits
- Proof of long-term care premium payments (receipt from the providor is best or photocopies of checks and statements) to attach to the NYS return
- 1099-Q forms from qualified education programs

- 1099-SA forms showing distribution from health savings accounts
- 5498 forms showing IRA contributions
- 5498-SA forms showing health savings account information
- IRS Letter 6419 showing Advanced CTC payment (2021 tax year only)
- IRS Notice 1444-C showing Economic Impact payment (2021 tax year only)
- Estimated tax payments made
- Prior year refund applied to this year
- Carry-over capital gains losses from the previous year
- Carry-over state credits from the previous year(s)
- Any tax-related communication from NYS or the IRS during the past year
- The amount paid for any purchases for which you did not pay sales tax (i.e. onlinr purchases)
- A check showing routing and account number if you want direct deposit to (or payment from) your account. Careful, deposit slips sometimes have different numbers.so we can’t use the except for Savings accounts.