

# What to Bring for your Free AARP Tax Preparation



- ◆ Proof of identification - photo ID, such as, driver's license or passport
- ◆ Social Security number verification: Social Security cards for you, your spouse and dependents or a Social Security number verification letter issued by the Social Security Administration or Form SSA-1099 Social Security Benefit Statement.
- ◆ Individual Taxpayer Identification Number (ITIN) assignment letter may be substituted for you, your spouse and your dependents if you do not have a Social Security number.
- ◆ Proof of foreign status, if applying for an ITIN
- ◆ Health insurance coverage information for you, your spouse and all dependents (Medicare, Medicaid, employer coverage or Form 1095 A, B, or C)
- ◆ Birth dates for you, your spouse and dependents on the tax return
- ◆ Wage and earning statements (Form W-2, W-2G, 1099-R, 1099-Misc) from all employers
- ◆ Form SSA-1099 Social Security Benefit Statement
- ◆ Interest and dividend statements from banks (Form 1099); your bank may not issue this to you if your interest dividend is under \$10 brokerage firms not required to send you these forms until the end of February.
- ◆ A copy of last year's federal and state returns (AARP Representative will not initiate preparing 2016 tax return without these documents)
- ◆ A blank check, if you want your refund to be direct-deposited or payment to be automatically withdrawn from your account; volunteer tax preparers will not keep this check nor any other of your papers.
- ◆ For a married-filing-jointly tax return, both spouses must be present to sign the required forms
- ◆ Total paid for daycare provider and the daycare provider's tax identification number, such as their Social Security number or business Employer Identification Number.
- ◆ AARP Tax Aide volunteers cannot prepare returns that include rental property, military income, alternative minimum tax, or those with many stock transactions or in other situations where volunteers have not been trained.

From: <http://www.irs.gov/Individuals/Checklist-for-Free-Tax-Return-Preparation>

**Appointments: Mondays, February 6 - April 17 and**

**Wednesday, March 15 (closed 2/13 and 2/20) • No Walk-ins.**

To book an appointment, call: (631) 351-3253 or sign up in Room 103

Please arrive 15 minutes prior to your appointment