AARP Foundation Tax-Aide - Tax Preparation
Documents We Need to Prepare Your Tax Return

PLEASE NOTE: You MUST provide items #1 and item #2; #3 if you have any dependents. If you do not provide them, we cannot prepare your return. **Provide all other items that are applicable to you.** Please look at your last tax return (2025 or 2024) and make certain that you either have 2026 tax forms from every person / organization from which you received one in the prior year or know why you do not have that form for 2026.

Item	Form or Document	Description and Notes
New item	Did you receive reported **tip income** this year?	Some tip income is not taxable.
New item	Were you **paid overtime**? You need to tell us how much money you made from overtime pay.	Overtime is not taxable up to $25,000 in some cases.
New item	Did you **pay loan interest on a new vehicle purchased in 2025 or 2026**?	Bring the VIN of the vehicle and how much interest that you paid. You may receive form 1098-VLI.
1	Government-issued photo ID for you (and your spouse if married filing jointly) -- front and back	Driver's license, passport, military or other government ID card
2	Front of your Social Security card OR ITIN number (and that of your spouse, if married filing jointly)	ITIN numbers should be supported by an issuing letter
3	Front of the Social Security card OR ITIN number for each of your dependents on your return	ITIN numbers should be supported by an issuing letter
4	Your most recent Federal tax return (2025 if filed, 2024, or 2023 if you have not yet filed for 2025)	Form 1040 and related Schedules. We don't need your tax forms (i.e. 1099-R or W-2) for prior years
5	Form W-2 - Wages / Salary from employment	One from each employer. These show your wages or salary received and taxes withheld for the year
6	Proof of bank account routing and account numbers for direct deposit (this is the fastest and safest way to receive your refund) or direct debit (if you owe taxes)	Please provide a voided check or other documentation with your bank's name, routing number, and your account number; not deposit slips as they may have different routing number
7	Information regarding any estimated tax payments you made to the IRS or your State	
8	Form 1095-A - Health Insurance Marketplace Statement	If you or anyone on your tax return had medical insurance coverage through the Marketplace (Obamacare, KNECT), information from your Form 1095-A MUST be included on your tax return
9	Form 1099-G - Certain Government Payments - State income tax refunds	
10	Form 1099-G - Certain Government Payments - Unemployment compensation	If you received unemployment benefits in 2026 but did not receive a tax form, contact your State's unemployment office to obtain this information
11	Form 1099-INT - Interest Income	You may receive these from your bank, credit union, investment firm, etc.
12	Form 1099-DIV - Dividends and Distributions	You may receive these from your broker, mutual funds, insurance companies or other sources
13	Form 1099-R - Distributions from Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.	Income distributed from any of these plans. This form will also report any roll over distributions.

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14	Form SSA-1099 - Social Security Benefit Statement	Statement showing benefits received in 2026
15	Form RRB-1099-R - Annuities or Pensions by the Railroad Retirement Board	Retirement or pension income from you or your spouse's railroad retirement
16	All information related to itemized deductions	Donations, Property tax, Home loan interest, etc.
17	Information regarding child or dependent care you paid	Provide the name, address, and EIN/SSN of the care provider, amount paid, and for which child
18	Form W-2G - Certain Gambling Winnings	This includes casino, bingo, or lottery winnings for which you received a W-2G
19	Amount of any gambling winnings not reported on Form W-2Gs	This includes casino, bingo, or lottery winnings for which you did not receive a W 2G
20	Amount of any gambling losses for the tax year, if you had gambling winnings	
21	Capital gains information	Brokerage statements, etc., showing your stock, bond, or other investment transactions
22	Form 1098-T - Tuition Statement and / or Form 1099-Q (section 529 Savings Plan)	You will receive this document from educational institutions attended by you, your spouse, or your dependents
23	Information regarding education expenses	Books, required uniforms, perhaps computer expense
24	Cancellation of Debt Form 1099-C	For non-business credit card debt ONLY
25	Form 1099-MISC - Miscellaneous Information	Reflects income received from royalties, rents, prizes or awards, or medical and health care payments.
26	Form 1099-NEC – Non-employee Compensation	Reflects income received for work performed as an independent contractor or for self-employment.
27	Expenses and mileage information related to your self-employment	
28	Documentation of all cash income you received	All cash income is reportable and subject to tax; do not include any income you received that is reflected on one of your other tax documents
29	Form 1099-K – Payment Card and Third Party Network Transactions	You may receive this form if you performed for-hire driving services or received income through a third-party payment network (you might receive this form if you drove for Uber, Lyft, DoorDash, GrubHub, etc.)
30	Form 1099-S – Proceeds from Real Estate Transactions	You may receive this form if you sold a home, residence, or real estate
31	Schedule K-1s Form 1065 (Partnerships) Form 1120-S (S-Corporations)	Partnerships & S-Corporation will file a copy of Schedule K-1 with the IRS to report your share of Interest, Dividends, Capital gains/losses, etc.
32	Information regarding alimony you paid or received last year	We will need the name of your former spouse and their Social Security number
33	Forgiveness of Main Home Mortgage – Form 982	If part or all of your mortgage was forgiven / cancelled, you will have this form from the lender
34	Residential Energy Credits – NOT IN SCOPE	These credits no longer exist for 2026. Tax-Aide cannot even do “carryforward” of these credits.