Documents to Bring to your AARP Tax Aide Visit

Personal Information

- **Photo ID**s for the taxpayer and spouse (if applicable)
- **Social Security cards** (or ITINs) for all the people on the tax return
- **IRS PIN** – for everyone on the return that may have received one from the IRS
- **Bank routing and account numbers** for direct deposit/debit
- Your **2023 and 2024 tax returns** if you have them

All Tax Documents you may have received:

- **Wage and Earnings Statements** (W-2, 1099-NEC, 1099-R, SSA-1099, etc.)
- **Investment Statements** from banks and brokerage firms (1099-B, 1099-INT, 1099-DIV)
- **Daycare expenses**, including Total paid and provider's tax ID
- **Itemized expenses** if you plan to use Itemized Deductions
- **Business costs** if self-employed
- **Education –** 1098T, college scholarships, College expenses, 1098-E (student loan), etc.
- **Health Coverage** 1095-A, B and/or C, 1099-SA for HSA distribution
- **All other documents you received from the IRS - If in doubt, bring it!**

NEW TAX LAWS

The new tax laws may allow certain taxpayers to receive tax benefits from Qualified Tips, Qualified Overtime and Qualified Vehicle Interest loans. We will need:

Tips – will appear on your W2, 1099-NEC or 1099-K documents. If self-reported, we require documentation of the tips and the occupation of the taxpayer.

Overtime – your employer should provide documentation for OT reported on the W2 or 1099 documents. If not available, we will require the base pay and the week-by-week hours worked.

Vehicle Loan Interest – for vehicles purchased in 2025 that had final assembly in the US, the interest may be deductible. We require the interest paid and the vehicle VIN.

Paper Check Phase-out – the IRS is phasing out the use of paper checks for both payments and refunds, with some limitations already in effect. See the links "IRS Payment Options" or "IRS Refund Options" on this website for information if you do not have a bank account.