AARP Tax-Aide TY 2014

Checklist for tax preparation

	Photo ID for taxpayer and spouse (if married)
	Proof of Social Security numbers for all persons listed on the return. SS card, letter/other document from SSA or SSA/RRB-1099 are all acceptable.
	Last year's tax return (highly recommended to ensure accuracy of this year's return)
	Account information (routing number and account number) for direct deposit or direct debit (if desired)

Income (forms):

	Wages (W-2)
	Social Security (SSA-1099)
	Railroad Retirement (RRB-1099)
	Interest (1099-INT, K-1, broker statement)
	Dividends and Capital Gain Distributions (1099-DIV, K-1, broker statement)
	Capital Gains/Losses (1099-B, 1099-S, broker statement) Note: also bring basis of assets sold
	Self-employment income (1099-MISC, business records)
	Pensions, IRA distributions (1099-R, latest Form 8606 if non-deductible contribution previously made)
	Unemployment (1099-G)
	State Tax Refund (1099-G)
	Gambling Winnings (W2-G)
	Other Income (1099-MISC not from self-employment)
	Canceled Credit Card Debt ONLY (1099-C)

Deductions, Credits & Payments

	Unreimbursed medical/dental expenses, e.g., doctor and prescription copays, hospital expenses, prescription glasses, etc. Total by category BEFORE seeing the preparer; keep receipts for your records.
	After-tax health insurance premiums (final pay statement for year) and long-term care premiums
	Sales tax on new auto purchase (Purchase receipt)
	Property Tax (1098 or canceled check)
	State Income Tax paid (canceled checks/other payment proof for estimated tax payments or prior year tax payment)
	Mortgage Interest and Mortgage Insurance (1098)
	Charitable Contributions by cash/check/credit card (Total OK; need receipts for your records)
	Estimated value of non-cash donations (Over $500 total also requires address of each recipient, acquisition date and cost of items donated)
	Misc. job related expenses (Receipts required for your records)
	Estimated Federal Tax payments (canceled check or other proof of payment)
	Education expenses (1098-T)
	Student Loan Interest (1098-E or letter from lender)
	Dependent Care expenses (Receipt plus provider's address and EIN or SSN and Hawaii GET #)
	Proof of Medical Insurance (Insurance card, Form 1095 from Marketplace or Employer)
	Hawaii Low Income Renter Credit (Landlord's name, address, General Excise Tax number, amount of rent paid)

Note: This list is for your benefit in getting organized before having your tax return prepared. It is not intended to be a complete list of the records and/or documents needed to complete your individual tax return.