

What to Bring to AARP Tax Appointment

- ✓ Photo ID for you and your spouse (if married)
- ✓ For married filing jointly, both spouses must be present
- ✓ Birth dates for you, spouse and/or dependents
- ✓ Social Security or ITIN cards for you, your spouse and/or dependents
- ✓ A copy of last year's (TY 2018) tax returns- Fed & CA
- ✓ All TY 2019 W-2 and 1099 forms
- ✓ TY 2019 1095 form(s) (Health Coverage)
- ✓ All TY 2019 full year credit union-bank-broker statements
- ✓ All TY 2019 cost documentation for any itemization items- unreimbursed medical expenses (must be sorted and summed by similar items), mortgage interest, car registration bill, property taxes, donations, etc.
- ✓ Any TY 2019 1098 form(s) (Tuition Statement, Student Loan Interest, if applicable)
- ✓ Any TY 2019 Health Savings Account documentation
- ✓ For direct deposit of refund, proof of account and bank's routing number (such as a check from your account)