

What to Bring to Have Your Taxes Completed

1. Proof of identification (photo ID) for Taxpayer and Spouse
2. Social Security cards for you, your spouse, and dependents or a Social Security number verification letter issued by the Social Security Administration.
3. An 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.
4. Birth dates for you, your spouse, and dependents on the tax return.
5. Wage and income statements (Form W-2, 1099, W-2G, 1099-R, 1099-Misc., SSA-1099) from all employers and other sources of income.
6. Interest and dividend statements from banks and brokerages (Form 1099, 1099-INT, 1099-DIV).
7. Supporting documents for itemized deductions, if applicable.
8. For Illinois homeowners, a copy of the real estate tax bill.
9. A copy of last year's federal and state tax returns, if available.
10. Proof of bank account routing and account numbers for direct deposit such as a blank check.
11. To prepare a married-filing-joint tax return, both spouses must be present to sign the required forms.
12. Total paid to daycare provider and daycare provider's tax identifying number such as their Social Security Number or business Employer Identification Number.
13. Form 1095-A, Affordable Health Care Statement if health insurance was purchased through the Health Care Exchange.

APPOINTMENT TIME: _____ **DATE:** _____

AARP Tax-Aide at the Allerton Public Library, 4000 Green Apple Lane, Monticello IL
Call for an Appointment 217-762-4676