The following is a list of the most common documents that AARP Tax-Aide preparers require in order to prepare a tax return. There may be others if the taxpayer has a unique situation.

IDENTIFICATION:

- Social Security Card, Social Security Statement, or other official documents from the US Government with Social Security number and full name. This is required for the taxpayer, spouse (if joint return) and all dependents. **NOTE:** Medicare cards no longer provide Social Security numbers and are not suitable as proof of ID.
- Driver’s license or other government photo ID for the taxpayer and spouse (if joint return).
- A check (blank or canceled) if you are requesting direct deposit of your refund.

TAX FORMS AND SUPPORTING DOCUMENTS:

- A copy of last year’s tax return
- W-2 and the final end of year pay stub from each employer
- Unemployment Compensation Statement (NJ no longer mails this so the taxpayer must print it out online)
- SSA-1099 (Social Security Statement) if receiving Social Security Benefits
- All 1099 forms (1099-INT, 1099-DIV, 1099-B, etc) and documentation showing the cost basis (adjusted purchase price) of any assets sold during the tax year
- 1099-MISC showing miscellaneous income
- 1099-R for any payments from a pension, annuity or retirement account
- All forms relating to federal income tax paid
- Dependent Care Provider information (including SS# of provider)
- Supporting records: property tax, mortgage interest, medical expenses, charitable contributions, Homestead Benefit (Rebate), Property Tax Reimbursement (PTR) rebate, etc. **If you participate in the NJ PTR program, please bring your PTR “blue book”**.

AFFORDABLE CARE ACT DOCUMENTATION:

If the taxpayer, spouse (if joint return) and/or any person who could be claimed as a dependent did not have health insurance for the entire year, or if insurance was provided through the Healthcare Marketplace/Exchange, you will need the following:

- A month by month listing showing for each person on the return, which months they had insurance and which months they were uninsured
- Information to determine if the reason the person was not insured qualifies for an exemption
- Exemption Certificate Number (ECN) if an exemption was granted by the Healthcare Marketplace/Exchange
- Form 1095-A if insurance was purchased through the Healthcare Marketplace/Exchange
- If insurance was offered by an employer, but was refused, you need to provide the cost of the insurance for both individual coverage and family coverage
- Income information (includes AGI, exempt interest, and untaxed social security) for each dependent listed on the return who meets the requirement to file a return