AARP FOUNDATION TAX-AIDE FREE TAX PREPARATION
WHAT TO BRING WITH YOU

Things to do if you want to speed up your time at the tax preparation site.

- Print and fill in the Tax Year 2019 Intake Form and bring it with you. If you don't fill it in before you arrive, you will be asked to complete one at the site before your tax return can be started. Do your best. We'll help you if you get stuck on any of the questions.
- If you had your return prepared by AARP Foundation Tax-Aide last year, try to return to the same location where you visited last year.
- Bring last year's tax return, if you have it.
- Bring your PTR (blue booklet), if you want help completing it.

Remember to bring with you all of the following that apply to your situation. Items in bold are required by all in order for us to do your return.

- **Picture ID for you and your spouse (if married)**
- **Social Security document for you and <u>every</u> person on your tax return**. This can be a Social Security Card, Form 1099-SSA if it contains your full Social Security Number, a Medicare Card if the number on the card ends in the letter "A" or a letter from the Social Security Administration with your social security number on it.
- The folder we gave you last year with last year's returns and tax documents (If AARP Tax-Aide did your tax return last year)
- Checkbook if you want to direct deposit any refunds or direct pay any amounts owed.
- All of your current tax year income documents
    - W-2 (Wages)
    - 1099 (Interest, dividends, security sales, and other income)
    - 1099-R Pensions
    - 1099-G (State income tax refund) You must get this online from the NJ Treasury by going to https://www1.state.nj.us/TYTR_Saver/jsp/TGI_1099/NJ1099Login.jsp
    - Unemployment compensation statements 1099G. You must get this online from NJ Unemployment by going https://myunemployment.nj.gov/
    - Social Security SSA-1099 or Railroad Retirement (RRB-1099 Tier 1 &2)
    - Brokerage statements
    - End of year pay stub (with breakdown of deductions, etc.)
    - Health insurance documents received from the government insurance marketplace, your employer and/or your insurance provider. 1095-A, 1095-B, 1095-C.
    - Any other income documents
- PTR amount received in the current tax year and forms (PTR-1 or PTR-2 last year and this year if available)
- Forms and/or cancelled checks as a record of all Federal and State Taxes Paid in the current tax year including any estimated tax payments

- Mortgage interest statement (Form 1098)
- Property tax statement and /or postcard from your local tax office or other records of property tax paid (should include Block, Lot and Qualifier)
- A list of all out-of-pocket medical expenses including health insurance payments and long-term care insurance payments, that can be backed up with receipts and/or canceled checks
- Round trip medical miles driven to/from medical facilities (doctors, hospitals, prescription drug locations, etc.)
- Distributions from an HSA (health savings account, if you have one) (Form 1099-SA)
- A list of charitable contributions backed up with receipts and/or canceled checks
- Child dependent care provider information
- Cancelled checks and/or 1098-T related to secondary education expenses
- If Alimony was paid, SSN for recipient(s) (may be on prior year return)

Life events that may affect your taxes:

- Purchased a new vehicle? (Bring documentation of sales tax)
- Purchase or sold a home? (Bring closing documentation)
- Have debt from a credit card cancelled/forgiven by a commercial lender? (Bring 1099-C)
- Receive a First Time Homebuyers Credit in 2008? (Bring repayment letter)

Health Insurance

The State of New Jersey requires that every person on the tax return have Minimum Essential Coverage health insurance or be eligible for an exemption. Be prepared to answer the following questions as part of the preparation of your tax return:

- Did you have health insurance coverage for you, your spouse, and all qualifying dependents for the entire current tax year? If not, for which months did you have health insurance coverage?
- Did you, your spouse, or any of your qualifying dependents purchase health insurance from the Health Insurance Marketplace (also known as The Exchange)? If yes, you will need to bring form 1095-A which you should have received from The Marketplace.
- If you did not have health insurance that meets the Minimum Essential Coverage requirements for any month in the year, we will explore your eligibility for an exemption. If you do not qualify for an exemption, you will be required to make a Shared Responsibility Payment as part of your current year taxes.
- Note: Medicare Part A and some Medicaid coverage qualifies as Minimum Essential Coverage.