<u>To Have Your Taxes Done by AARP TaxAide You Must:</u>

1. **Make one appointment for every return you want us to prepare** (children's, parents, prior year, amended, etc.)

2. **Bring <u>Last Year's tax return</u>, <u>Picture ID, and</u> <u>Social Security card</u>** and other official documentation such as Social Security statement for yourself and all dependents.

3. **Arrive at least 20 minutes early** to sign in and complete necessary paperwork.

4. **Bring all necessary financial documents. (Check last year's tax envelope** to be sure you have similar information gathered for this year's taxes.)

5. **Direct deposit can be made to checking or savings account this year (**must bring blank check or bank card with account and routing numbers on it)

6. Bring **Property Tax Bills**: Summer and Winter for the Property Tax Credit. You'll need bills assessed in 2018 AND those paid in 2018 if different to determine eligibility.

7. Bring **<u>Utility bill</u>** showing your energy use for the year if you qualify for the Home Heating credit (usually totals are listed in Nov. or Dec. energy bill)

8. Bring **<u>health care documentation</u>**: Medicare (usually on your Social Security SSA-1099/Form SSA-1099-SM), employer coverage **OR** Affordable Health Care (for Affordable Health Care you must bring your 1095A)

9. If filing joint, both taxpayers must come to the appointment.

<u>Things that will help speed the process of preparing your return</u>

- **Take information out of envelopes and open folded pieces of paper**. Our intake people are qualified to help you and we can't do your taxes without your documents being removed from your envelopes.
- **Organize your paperwork** into Income (Examples: 1099, W2, Interest) and Everything Else
- **Leave Brokerage 1099 statements in their envelopes**, particularly if you have more than one.