<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, prior year, etc.)

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

3. **Arrive at least 15 to 20 minutes early** to sign in and complete necessary paperwork.

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

5. **Direct deposit** will only be made with a blank check to verify routing and account numbers.

6. Bring **Property Tax Bills**: Summer and Winter assessed in 2017 for the Property Tax Credit (if you qualify)

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

8. Bring **<u>health care documentation</u>**: Medicare (usually on your Social Security 1099SA), employer coverage or Affordable Health Care

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**.

- **Organize your paperwork** into Income (Examples: 1099SA, W2, Interest) and Everything Else

- **Leave Brokerage 1099 statements in their envelopes**, particularly if you have more than one.