

## TY 2022 Order of Tax Documents

### Photo ID & Social Security Card

### Income

- 1099-SSA (or social security card) **FIRST**
- 1099 R (IRA/Pension Distributions, Railroad Retirement)
- Wages & Salary (W-2)
- Interest and Dividends (1099-INT / 1099-DIV)
- Brokerage Statements (including 1099-B)
  - **Keep these together and in page number order**
- 1099-NEC, 1099 -Misc.
- Schedule K-1 (if applicable). Ask **SC** if there are any questions on scope
- Other Income (Gambling Winnings, Other Compensation, Payment from Qualified Education Programs, Cancellation of Debt)
- **Itemized Deductions** (counselor will sort). You can give the taxpayer the itemized deduction handout if it is needed.
- **Important: For TY 2022: Put the I+I form with the signed consents and into the AARP envelope to give to the CF at the computer. The taxpayer keeps all their own other paperwork.**
- **Remind** the taxpayer(s) that ONE person must stay in the tax preparation area and to allow 2-3 hours for their tax return to be completed.

12/14/2022