

TY 2024 Order of Tax Documents

Photo ID & Social Security Card

Current Year Identity Theft Letter and PIN (if applicable)

Death Certificate (if applicable)

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 together + in order
- 1099-MISC, 1099 -NEC
- Schedule K-1 (if applicable). Ask SC if there are any questions on scope
- Schedule C Worksheet
 - Self-employment, cash income/expenses)
- Other Income
 - (Gambling Winnings, Other Compensation, Payment from Qualified Education Programs, Cancellation of Debt)
- Itemized Deductions (counselor will sort).
 - Give the taxpayer the itemized deduction handout if it is needed.

Important: For TY 2024:

- Put the I+I form with the signed consents and into the AARP envelope to give to the CF at the computer.
- Return ALL other paperwork to the taxpayer(s).

Remind the taxpayer(s):

- ONE person must stay in the tax preparation area
- Allow 2-3 hours for the tax return to be completed.

12/16/2024