



## AARP TAX PREPARATION PROGRAM

Your appointment for free IRS tax prep with the AARP volunteer team is set for:

Date:

Time:

Location: Wolfeboro Public Library, 259 S. Main Street, Wolfeboro NH

**PLEASE CALL THE LIBRARY AT 603-569-2428 IF YOU NEED TO CANCEL YOUR APPOINTMENT.**

### What to bring:

- 2024 IRS Tax Return
- Photo ID
- A blank check to get routing and account info (not a deposit slip)
- Social Security cards for all persons on tax return
- If claiming childcare, bring the federal ID number, name, address of the center or the Social Security number for childcare provider, child credit information
- If you sold real estate, stocks, bonds, or mutual funds bring the original cost of the item sold and the date you acquired it
- Tax info received for tax year 2024 including:
  - W-2s
  - Retirement 1099s
  - Social Security info
  - Bank/Investment 1099s
  - Tuition and Student Loan information
  - Form 1095-A Health insurance marketplace Statement (If health insurance was obtained through the Obamacare "Marketplace")
  - Forms 1095-B and 1095-C showing insurance coverage, if you received them
  - Any correspondence from the IRS
- If you itemize please bring:
  - Mortgage information
  - Property tax bill
  - Vehicle registration
  - Unreimbursed medical bills
  - Charity receipts