

Tax Help

[TAX ASSISTANCE](#)

[Tax Help from AARP](#)

Forms

[Federal](#)

[Montana](#)

[Other States](#)

Checklist for Helpful Tax Preparation Materials:

current year's tax forms and preparation booklet

copy of last year's income tax return(s)

W2 forms from each employer

unemployment compensation statements

SSA-1099 forms showing interest and/or dividends and documentation showing original purchase price of sold assets

1099-misc. showing any miscellaneous income

all forms indicating federal income tax paid

dependent care provider information (name, employer, ID, Social Security #)

all receipts or canceled checks if itemizing deductions

Social Security #s for all dependents