



MILITARY TAX-PREP CHECKLIST

IT'S TAX SEASON, **ARE YOU PREPARED?**

HERE'S A BASIC CHECKLIST OF DOCUMENTS AND ITEMS YOU MAY NEED TO FILE YOUR RETURN:

- Military ID
- Social Security numbers (for each family member claimed)
- Wage and earning statements (W-2, W-2G or 1099-R) for all eligible family members
- Childcare cost information
- Investment income forms
- Charitable donation receipts
- Bank routing and account numbers
- Last year's tax returns
- Social Security benefit information
- Student loan interest forms
- Home mortgage interest information

* For more information on tax deadlines and preparation, visit www.irs.gov.

LOOKING FOR A TAX-SMART INVESTMENT STRATEGY THAT CAN GENERATE INCOME IN RETIREMENT? **AAFMAA WEALTH MANAGEMENT & TRUST (AWM&T) CAN HELP.**

CALL US AT 910-307-3500
OR VISIT US AT WWW.AAFMAA.COM/WEALTH
TO LEARN MORE!



AAFMAA Wealth Management & Trust LLC

FINANCIAL PLANNING • INVESTMENT MANAGEMENT • TRUST SERVICES

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