AARP FOUNDATION TAX-AIDE

# *Taxpayer Information and Responsibilities*

***Welcome to AARP Foundation Tax-Aide. Our IRS-certified volunteers will assist you shortly. In the meantime, please take a moment to read the following information.***

**Taxpayers will:**

- Provide all required information and documents to ensure the completion of your return
- Sign-in at the tax site and follow the guidance of the volunteer
- Complete the Intake Booklet fully and accurately
- Participate in the intake interview, tax preparation and quality review process
- Inform the volunteer of all income including cash, gambling winnings, etc.
- Understand that some returns are beyond the program scope (see scope poster) or have complicated state or other issues. If your return falls outside the program scope, you must either prepare your own return or engage a professional preparer.
- Ensure the return is complete and accurate before signing. Joint returns require the signature of both spouses.
- Agree that you are responsible for the accuracy of the return
- Treat volunteers with courtesy and respect
- Questions? Call 888-687-2277 or email taxaide@aarp.org

**Tax-Aide volunteers will:**

- Treat taxpayers in a courteous and professional manner
- Prepare tax returns within the scope of the program
- Provide tax assistance based on the information and documents provided by the taxpayer
- Quality review all tax returns
- Respect taxpayers' privacy and confidentiality

## *Essential Documents to Have at the Tax Site*

- ☐ Government-issued photo ID for the taxpayer(s) on the return
- ☐ Social Security cards or ITIN documentation for all
- ☐ Copy of 2019 and 2020 tax returns
- ☐ Income documents for wages, interest, dividends, capital gains/losses, unemployment compensation, pensions and other retirement income, Social Security benefits and self-employment.
- ☐ Brokerage statements – sale of stocks or bonds
- ☐ Healthcare – Forms 1095 A if have marketplace insurance
- ☐ Mortgage interest, medical/dental expenses, charitable donations, sales, income or property taxes
- ☐ Records of federal and state income taxes paid
- ☐ Educational expenses – Form 1098-T, student's detailed financial school account; other education expenses
- ☐ Checking or savings account info for direct deposit of refund or direct debit of balance due
- ☐ IRS letters showing Economic Impact Payments (EIPs) and Advanced Child Tax Credit payments received.
- ☐ Any other recent IRS or state tax department correspondence

## *Tax-Aide Process*

### Waiting Area

Sign-In

Complete Intake Booklet

Organize Your IDs, SS Cards and Tax Documents

### Tax Preparation

IDs, SS Cards Checked

Intake Booklet and Tax Documents Reviewed

Taxpayer Interviewed

Tax Return Prepared

### Quality Review

IDs, SS Cards Checked

Intake Booklet and Tax Documents Reviewed

Taxpayer Interviewed

Tax Return Reviewed

Return Signed

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AARP Foundation® Tax-Aide