

Taxpayer Information and Responsibilities

Welcome to our AARP Foundation Tax-Aide site. This site is staffed with AARP Foundation Tax-Aide volunteers that have been trained and are certified by the IRS to prepare a range of individual income tax returns. Please take a moment to read the following information which will ensure a smooth process for both you and the volunteers at this site:

- **You are responsible for the accuracy of your return.** You are to ensure the return is complete and accurate before you sign the Form 8879 the volunteer will ask you to sign. Our volunteers do not provide legal or financial advice. Our job is to assist you to complete and file your federal and/or state tax return. We are not permitted to provide advice, such as how you can reduce your tax responsibility or handle other financial responsibilities. You may need to consult with a paid tax professional or financial advisor if you have questions that we cannot answer.
- **There are some types of returns that we cannot assist you with.** Some taxpayers have situations that require a tax form that is outside the scope of our program, our training and the IRS certification. Please review the poster which is available at this site for a list of circumstances which are deemed “out of scope” for this program. Additionally, even if the return does fit within the allowable scope of our assistance, a volunteer may need to decline to assist you if your return is beyond the comfort level of their experience. If you have any of those situations, then this site will not be able to prepare your tax return, even if this site has done so in the past. If you have a question about whether your return is out of scope, ask a volunteer so that you do not have an unnecessary wait. **Please do not ask that a volunteer make an exception in your case.**
- **The Client Intake form must be fully and accurately completed before your return can be started.** Please let us know if you have questions or need assistance completing the form. If you do not have required documentation for an exemption, deduction or tax credit then you will need to return when you have it available for the volunteer to review. All relevant tax records are required to prepare an accurate tax return.
- **Taxpayers will be called for assistance in the order listed on the sign-in sheet, or appointment (if applicable at this site).** Exceptions will be made if the circumstances of the return provide that a specific volunteer is more appropriate to prepare the return accurately or expeditiously. AARP members are not given preference over non- members.
- **If you have a joint return, it will require the signature of both spouses.** If your spouse is not present at the site, then you will have to obtain your spouse’s signature and return the forms to the site before the return can be e-filed.
- **Once your return is prepared it will be given a quality review by a second trained and certified volunteer in order to help ensure that it is thorough and accurate.** Although this may require you to have an additional wait, this quality review service is done for your benefit to ensure that you receive the best service that we can provide.

- **You can expect our volunteers to treat you in a courteous and professional manner.** In return, our volunteers expect you to treat them with courtesy as well. Anyone who becomes disruptive will be asked to leave without having his or her return prepared. Failure to comply when requested to leave the site may result in the police being contacted.
- **Feel free to let us know if you have comments, questions or concerns about your return or your experience at this site.** If you need to contact us after this site has closed at the end of the tax season, you should contact AARP at: 1-888-687-2277 or 1-800-424-2277 (toll-free) or send an email to: Taxaide@aarp.org . Please do not try to contact any volunteer counselors at their home or outside of this site.

In order to assist the volunteer in accurately and completely preparing your return, please be sure you have the following documents with you:

Required documents in order to have return started:

- Social Security Cards or comparable documentation for you, your spouse (if applicable) and all others on the return.
- Picture ID for the taxpayer(s) present when the return is being prepared.
- Income related documents: Forms W2, Unemployment compensation statements, SSA 1099, 1099R, and other 1099 forms, or identification of other income such as self employment.
- Brokerage statements or other documentation for sale of capital property (e.g. stocks, bonds), including date purchased and cost basis.
- Expense related documents: Checks and forms showing federal and state taxes paid, 1098 forms showing mortgage interest, documentation of medical, dental, charity, or business expenses, any vehicle and property taxes, and mortgage interest paid. Receipts for expenses need to be in reasonable order and legible. Summaries and totals are appreciated and in some cases required.
- Brokerage statements or other documentation showing the cost basis (purchase price) and date purchased for all securities or property sold or transferred during the tax year. Information related to educational expenses (if applicable) including Form 1098-T from the institution, and receipts for other expenses.
- A check with your name printed on it for direct deposit/debit of any refund/balance due. A check in your checkbook is acceptable. A voided check is not required.

Other helpful documents to bring:

- Please provide a copy of your last year's tax return. The data on the last year's return is needed to complete the new tax return if you had itemized deductions the previous year, received a state refund, and in other circumstances.
- If you receive a pension or annuity from a former employer, please bring the date that you began to receive payments. (In some cases, this is required.)