Taxpayer Information and Responsibilities

Welcome to AARP Foundation Tax-Aide. Our IRS-certified volunteers will assist you shortly. But, before then, 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 sheet fully and accurately
- Participate in the intake interview, tax preparation and quality review process
- Inform the volunteer of all your 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 so you might be referred elsewhere
- 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 your 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 last year's tax return
- ☐ Income documents – Forms W2, SSA 1099, 1099R, 1099G, other 1099 forms, self-employment records
- ☐ Brokerage statements - sale of stocks or bonds
- ☐ Healthcare – Forms 1095 A, B, or C; marketplace exemption letters
- ☐ 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
- ☐ Any recent IRS or state tax department correspondence

Tax-Aide Process

Waiting Area	Tax Preparation	Quality Review
Sign-In	**IDs, SS Cards Checked**	**IDs, SS Cards Checked**
Complete Intake Sheets	**Intake Sheets and Tax Documents Reviewed**	**Intake Sheets and Tax Documents Reviewed**
Organize Your IDs, SS Cards and Tax Documents	**Taxpayer Interviewed**	**Taxpayer Interviewed**
	Tax Return Prepared	**Tax Return Reviewed**
		Return Signed

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