

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

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| <ul style="list-style-type: none"> <input type="checkbox"/> Government-issued photo ID for the taxpayer(s) on the return <input type="checkbox"/> Social Security cards or ITIN documentation for all <input type="checkbox"/> Copy of last year's tax return <input type="checkbox"/> Income documents for wages, interest, dividends, capital gains/losses, unemployment compensation, pensions and other retirement income, Social Security benefits and self-employment. <input type="checkbox"/> Brokerage statements – sale of stocks or bonds <input type="checkbox"/> Healthcare – Forms 1095 A if have marketplace insurance | <ul style="list-style-type: none"> <input type="checkbox"/> Mortgage interest, medical/dental expenses, charitable donations, sales, income or property taxes <input type="checkbox"/> Records of federal and state income taxes paid <input type="checkbox"/> Educational expenses – Form 1098-T, student's detailed financial school account; other education expenses <input type="checkbox"/> Checking or savings account info for direct deposit of refund or direct debit of balance due <input type="checkbox"/> Any recent IRS or state tax department correspondence |
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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