

Free Tax Preparation Help with AARP Foundation Tax-Aide

Thursdays
10:15 am—2:15 pm

February 13, 2020

February 27, 2020

March 12, 2020

March 26, 2020

April 9, 2020

Pinckney Community Public Library will be hosting the AARP Foundation Tax-Aide volunteers this income tax season.

AARP Foundation offers free tax preparation help to anyone who needs it—with special attention to those who are 50 or older or have low to moderate income.

Appointments will be scheduled for an hour and **must** be made in advance. The back of this flyer provides additional information about the service and all documentation needed for the appointment.

Appointments can be made by visiting the library.

Pinckney Community Public Library, 125 Putnam Street, Pinckney, MI 48169
734-878-3888, www.pinckneylibrary.org

How AARP Foundation Tax-Aide Can Help You Today

We offer free, in-person tax return preparation to anyone who needs it. AARP Foundation Tax-Aide volunteers are trained to help you file a variety of income tax forms and schedules.

In certain situations, however, our volunteers may be unable to provide assistance. The Volunteer Protection Act requires that our volunteers stay within the scope of tax law and policies set by the IRS and AARP Foundation. Here's a guide to what our Tax-Aide volunteers can — and can't — do.

We can prepare most returns with:

- Wages, interest, dividends, capital gains/losses, unemployment compensation, pensions and other retirement income, Social Security benefits.
- Self-employment income, with limits.
- Most income reported on Form 1099-MISC.
- Schedule K-1 that includes only interest, dividends, capital gains/losses or royalties.
- Qualified Business Income deduction.
- Itemized deductions, including noncash contributions to charity that total no more than \$5,000.
- Cancellation of nonbusiness credit card debt.
- IRA contributions — deductible or not.
- Most credits, such as earned income tax credit, education credits, child/additional child credit and credit for other dependents, child/dependent care credit, premium tax credit, simplified method foreign tax credit on investments, and retirement savings credit.
- Repayment of first-time homebuyer credit.
- Estimated tax payments.
- Tax on a Child's Investment and Other Unearned Income (Kiddle Tax).
- Injured spouse allocation, depending on state.
- Health Savings Accounts (HSA)*.
- Amendments to filed returns.
- Prior three tax years' returns.

* **HSA:** Returns with HSA contributions or distributions can be prepared **only** when the preparing volunteer is certified in the HSA module and another volunteer is certified to review HSA returns.

1-888-227-7669 aarpfoundation.org/taxaide

We can't prepare returns with:

- Self-employment if there are employees, losses, expenses that exceed \$25,000, depreciation, business use of home, or other complicating factors.
- Complicated capital gains/losses, such as futures or options.
- Complicated Schedule K-1.
- Rental income, except land-only rentals or rentals of personal residence less than 15 days.**
- Royalty income with expenses if not from self-employment.
- Farm income or expenses.
- Moving expenses.**
- Some investment income or itemized deductions that are not included in our training.
- Alternative Minimum Tax, Additional Medicare Tax, or Net Investment Income Tax.
- Foreign financial asset reporting requirements.

** **Rental or moving:** A volunteer can prepare returns for active duty military personnel **only** when the preparing volunteer is certified in the military module and another volunteer is certified to review military returns.

AARP Foundation Tax-Aide is offered in conjunction with the IRS.

AARP Foundation
For a future without senior poverty.

Taxpayer Information and Responsibilities

Welcome to AARP Foundation Tax-Aide where you will be helped by Tax-Aide volunteers certified by the IRS. Please take a moment to read the following information.

Taxpayers will:

- Provide all required 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 and supplemental intake sheet fully and accurately
 - Participate in the intake interview, tax preparation and quality review process
 - Inform volunteer of all your income including cash, gambling winnings, etc.
 - Understand that some returns are beyond the program scope (see scope poster) 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 888-887-2277 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

Tax-Aide Process

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

Essential Documents to Have at the tax site

Picture ID for the taxpayer(s) on the return	Mortgage interest, medical, dental, or charitable donations; business; property taxes
Social Security cards or ITIN documentation for all	Records of federal and state taxes paid
Copy of last year's tax return	Educational expenses – Form 1098-T and expense receipts
Income documents – Forms W2, SSA 1099, 1099R, 1099G, other 1099 forms, or self-employment income.	Bank check for direct deposit/debit of refund/balance due
Brokerage statements - sale of stocks or bonds	Healthcare – 1095 A, B, or C; marketplace exemption letters

For a complete list of documents some taxpayers might need, visit: aarpfoundation.org/taxaide

AARP Foundation