

## 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](mailto: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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| <input type="checkbox"/> Government-issued photo ID for the taxpayer(s) on the return  | <input type="checkbox"/> Records of federal and state income taxes paid  |
| <input type="checkbox"/> Social Security cards or ITIN documentation for all   | <input type="checkbox"/> Educational expenses – Form 1098-T, student's detailed financial school account; other education expenses |
| <input type="checkbox"/> Copy of 2019 and 2020 tax returns   | <input type="checkbox"/> Checking or savings account info for direct deposit of refund or direct debit of balance due              |
| <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"/> IRS letters showing Economic Impact Payments (EIPs) and Advanced Child Tax Credit payments received.      |
| <input type="checkbox"/> Brokerage statements – sale of stocks or bonds  | <input type="checkbox"/> Any other recent IRS or state tax department correspondence   |
| <input type="checkbox"/> Healthcare – Forms 1095 A if have marketplace insurance   |  |
| <input type="checkbox"/> Mortgage interest, medical/dental expenses, charitable donations, sales, income or property taxes   |  |

### *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