

**Free AARP Tax Assistance at Robinson Community Center**  
**Every Wednesday starting February 5<sup>th</sup> through April 9<sup>th</sup>, 2014**

**9:30am – 11:30am**

**No pre-registration Take about 15 clients each week.**

**Seniors with an IN SC-40 are not part of the 15**

**If you already sent your Federal we do not do Indiana only.**

**In order to start your return please be sure you have the following required documents with you:**

Must have Social Security Cards (no photo copies) or printout from Soc. Sec. for you, your spouse (if applicable) and all dependents.

Picture ID for taxpayer and spouse

For a joint return both spouses need to sign the 8879 before the return can be e-filed.

A copy of last year's tax return

**Income related documents:**

Forms W2, Unemployment compensation statements, SSA 1099 (Social Security), 1099R, interest (1099-INT) dividends (1099-DIV), 1099 Misc. and other 1099 forms showing home mortgage interest or other income.

**Expense related documents:**

Checks and forms showing federal and state taxes paid, including quarterly estimated payments, 1098 forms,

If itemizing: Documentation of medical, dental, charity, or business expenses, any vehicle and property taxes, and mortgage interest paid. No non-cash items over \$500 on Sch. A.

Receipts for expenses need to be in reasonable order and legible.

ID number and address of child care provider and child care expenses.

Amount of 2013 payments for student loan interest and/or college tuition (Receipts, canceled checks, 1098-T, etc.)

Indiana property taxes or rent paid with landlord's name and address.

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. We do **NOT** do a complicated Schedule D.

For Business we do C-EZ only (\$ 5,000. or less in expenses and no loss)

**Other helpful documents to bring:**

Please provide a copy of your last year's tax return. Some of the data on last year's return may be needed to complete this year's tax return. If you itemized deductions last year and received a refund you will need the previous year's return.

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.)

A check with your name printed on it for direct deposit/debit of any refund/balance due. You can leave the check in your checkbook. It is needed for information only.

## TAXPAYER INFORMATION AND RESPONSIBILITIES

**Welcome to our AARP Foundation Tax-Aide site.** This site is staffed with AARP 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:

- 1. You are responsible for the accuracy of your return.** 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.
- 2. 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.**
- 3. 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.
- 4. 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.
- 5. 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.
- 6. Once your return is prepared it will be given a quality review by a second trained and certified volunteer in order to 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.
- 7. 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.
- 8. 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](mailto:Taxaide@aarp.org) . Please do not try to contact any volunteer counselors at their home or outside of this site.