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

Sign-In

Complete Intake Sheets

Organize Your IDs, SS Cards and Tax Documents

Tax Preparation

IDs, SS Cards Checked

Intake Sheets and Tax Documents Reviewed

Taxpayer Interviewed

Tax Return Prepared

Quality Review

IDs, SS Cards Checked

Intake Sheets and Tax Documents Reviewed

Taxpayer Interviewed

Tax Return Reviewed

Return Signed

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AARP Foundation

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