

AARP TAX AIDE SERVICES

PREPARATION AND FILING OF 2024 TAX RETURNS

AARP Tax-Aide is pleased to offer the preparation and filing of 2024 federal and state tax returns within a limited scope. We will be providing same day tax return preparation and filing of the returns at this location under what we call the “drop-off” model. Basically, you drop off the return documents in the morning and pick up the finished returns the same afternoon.

Steps:

1. Make an appointment by calling the library staff during business hours.
2. On the appointed day please arrive at the scheduled time.
3. We will complete an intake interview, take your tax documents and schedule a return visit, generally for the same day, for you to pick up and sign your completed tax returns.
4. You will return to review and sign your return and pick up all your tax documents.
5. We will then electronically file your returns once they are signed off by you.

What you need to do:

1. Review the reverse side of this notice for what to bring.
2. Fill out the Intake/Interview Booklet (Form 13614-C). Please do not write in the grayed-out areas of the form. These grayed-out areas will be completed during the intake interview.
3. Gather all your tax documents. Please bring your 2023 prior year tax returns, if you can locate them.
4. Bring the completed Intake/Interview booklet (Form 13614-C), and all tax documents on your assigned day and time
5. You will return later that same day to sign and pick up your tax returns. For joint returns, both parties need to be available to sign the completed returns.

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DOCUMENTS REQUIRED TO PREPARE 2024 TAX RETURNS

Personal Identification

- Driver's License
- Social Security Numbers (Social Security Card or SSA 1099-R statement)
- Bank Routing and Account numbers (preferably from a voided check) to support direct deposit

Supporting Process documents

- Completed Intake/Interview Booklet (Form 13614-C)
- 2023 Federal and State returns (from last year) and accompanying documents

Common Supporting Tax Documents

- Any correspondence from the IRS or state tax agencies
- All Form W-2s (from employers)
- All Unemployment 1099-G
- All Form 1099-R (from Social Security, Pensions, IRA Distributions)
- All Form 1099-INT (from banks, credit unions)
- All Form 1099-DIV (from brokerage firms)
- Property Tax Statements (from County Tax Office)
- Brokerage Statements containing 1099-DIV, 1099-INT, 1099-OID, 1099-B

Less Common Supporting Tax Documents

- Form 1099 (1099-MISC, 1099-LTC, 1099-K, 1099-NEC, 1099-C, etc.)
- Form 1098 (1098-T from schools, 1098-E for student loans, etc.)
- Form 1095 (from health insurance providers or employers)
- W2-G (gambling winnings)
- Documents to support itemized deductions (medical receipts, charity donations)
- Documents to support claims for home energy credits (invoices, energy efficiency certificates)
- Documents to support business expenses