

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 888-687-2277 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

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	
Copy of last year's tax return	Records of federal and state taxes paid
Income documents – Forms W2, SSA 1099, 1099R, 1099G, other 1099 forms, or self-employment income.	Educational expenses – Form 1098-T and expense receipts
Brokerage statements - sale of stocks or bonds	Bank check for direct deposit/debit of refund/balance due
Healthcare – 1095 A, B, or C; marketplace exemption letters	

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