

# 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](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

## Tax-Aide Process

Waiting Area	Tax Preparation	Quality Review
<b>Sign-In</b> <b>Complete Intake Sheets</b> <b>Organize Your IDs, SS Cards and Tax Documents</b>	<b>IDs, SS Cards Checked</b> <b>Intake Sheets and Tax Documents Reviewed</b> <b>Taxpayer Interviewed</b> <b>Tax Return Prepared</b>	<b>IDs, SS Cards Checked</b> <b>Intake Sheets and Tax Documents Reviewed</b> <b>Taxpayer Interviewed</b> <b>Tax Return Reviewed</b> <b>Return Signed</b>

## 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](http://aarpfoundation.org/taxaide)

**AARP** Foundation®

CALL FOR APPOINTMENT :

**SPOTSWOOD OFFICE ON AGING**  
**732-251-3432**