Metuchen Senior Center
15 Center Street, Metuchen

Call 732-632-8524 TODAY to schedule an appointment!

Hours for Tax Preparation*: Tuesday & Thursday—Weather Permitting
February 4, 6, 11, 13, 18, 20, 25, 27
March 3, 5, 10, 12, 17, 19, 24, 26, 31
April 2, 7, 9

Appointment Times: 9:15AM, 10:15AM and 11:15AM

We work hard to make sure you get every tax credit and deduction you’ve earned.

The program is open to taxpayers of all ages. AARP membership is not required.

Our volunteers are trained and IRS-certified every year.

To find sites near you, visit aarpfoundation.org/taxaide or call us toll-free at 1-888-227-7669.
AARP FOUNDATION TAX-AIDE

Taxpayer Information and Responsibilities

Welcome to AARP Foundation Tax-Aide. Our IRS-certified volunteers will assist you shortly. In the meantime, 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 Booklet fully and accurately
- Participate in the intake interview, tax preparation and quality review process
- Inform the volunteer of all 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. If your return falls outside the program scope, we will refer you to an alternative.
- 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 the 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, 1099-R, 1099-G, other 1099 forms, self-employment records
- Brokerage statements – sale of stocks or bonds
- Healthcare – Forms 1095 A if have marketplace insurance
- 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 Booklet
Organize Your IDs, SS Cards and Tax Documents

Tax Preparation
IDs, SS Cards Checked
Intake Booklet and Tax Documents Reviewed
Taxpayer Interviewed
Tax Return Prepared

Quality Review
IDs, SS Cards Checked
Intake Booklet and Tax Documents Reviewed
Taxpayer Interviewed
Tax Return Reviewed
Return Signed
How AARP Foundation Tax-Aide Can Help You Today

We offer free, in-person tax return preparation to anyone who needs it. AARP Foundation Tax-Aide volunteers are trained to help you file a variety of income tax forms and schedules.

In certain situations, however, our volunteers may be unable to provide assistance. The Volunteer Protection Act requires that our volunteers stay within the scope of tax law and policies set by the IRS and AARP Foundation. Here's a guide to what our Tax-Aide volunteers can — and can't — do.

**We can prepare most returns with:**

- Wages, interest, dividends, capital gains/losses, unemployment compensation, pensions and other retirement income, Social Security benefits.
- Self-employment income, with limits.
- Most income reported on Form 1099-MISC.
- Schedule K-1 that includes only interest, dividends, capital gains/losses or royalties.
- Qualified Business Income deduction.
- Itemized deductions, including noncash contributions to charity that total no more than $5,000.
- Cancellation of nonbusiness credit card debt.
- IRA contributions — deductible or not.
- Most credits, such as earned income tax credit, education credits, child/additional child credit and credit for other dependents, child/dependent care credit, premium tax credit, simplified method foreign tax credit on investments, and retirement savings credit.
- Repayment of first-time homebuyer credit.
- Estimated tax payments.
- Tax on a Child's Investment and Other Unearned Income (Kiddie Tax).
- Injured spouse allocation, depending on state.
- Health Savings Accounts (HSA).*
- Amendments to filed returns.
- Prior three tax years’ returns.

*HSA: Returns with HSA contributions or distributions can be prepared only when the preparing volunteer is certified in the HSA module and another volunteer is certified to review HSA returns.

**We can’t prepare returns with:**

- Self-employment if there are employees, losses, expenses that exceed $25,000, depreciation, business use of home, or other complicating factors.
- Complicated capital gains/losses, such as futures or options.
- Complicated Schedule K-1.
- Rental income, except land-only rentals or rentals of personal residence less than 15 days.**
- Royalty income with expenses if not from self-employment.
- Farm income or expenses.
- Moving expenses.**
- Some investment income or itemized deductions that are not included in our training.
- Foreign financial asset reporting requirements.

** Rental or moving: A volunteer can prepare returns for active duty military personnel only when the preparing volunteer is certified in the military module and another volunteer is certified to review military returns.

AARP Foundation Tax-Aide is offered in conjunction with the IRS.

1-888-227-7669  aarpfoundation.org/taxaide

AARP Foundation
For a future without senior poverty.