Tax Preparation Assistance is available to middle and low-income taxpayers.
AARP Tax-Aide sites give special attention to those ages 60 and older.

Prepare for Your Meeting

Before meeting tax assistance volunteer, gather together some basic information and bring it with you to the site, such as:

- Copy of last year's income tax returns
- W-2 forms from each employer
- Unemployment compensation statements
- SSA-1099 form if you were paid Social Security benefits
- All 1099 forms (1099-INT, 1099-DIV, 1099-misc., etc.) showing interest and/or dividends as well as documentation showing the original purchase price of your sold assets
- 1099R forms if you received a pension or annuity
- All forms indicating federal income tax paid
- Dependent/Child care provider information (name, employer ID, Social Security number)
- All receipts or canceled checks if itemizing deductions
- Social Security numbers for all dependents.
- Spouse, if filing jointly
- Bank Account Information for Direct Deposit (optional)

Forms IRS certified Volunteer CAN prepare:	Forms requiring the assistance of a PAID Preparer:
• Form 1040 EZ • Form 1040 A With Schedules 1,2,3 & EIC • Form 1040 With Schedules A, B, EIC & R • Form 1040 V • Form 1040 ES • Form 2441 (Child and Dependent Care) • Form 8663 (Education Credits) • Form 8812 (Additional Child Tax Credit) • Schedule C (Profits and Loss from Business)	• Complicated & Advanced Schedule D (Capital Gains and Losses) • Schedule E (Rents and Losses) • Form SS-5 (Request for Social Security Number) • Form 2106 (Employee Business Expenses) • Form 3903 (Moving) • Form 8606 (Nondeductible IRA) • Form 8615 (Minor's Investment Income)

NOTE: This is a basic guideline - Individual Sites may have additional limitations or capabilities.

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