AARP FOUNDATION TAX-AIDE

OUR HELP IS FREE, INDIVIDUALIZED AND NO STRINGS ATTACHED.

AND WE'RE RIGHT HERE IN YOUR COMMUNITY.

We offer free tax help to low- and moderate-income tax-payers, especially those 60 and older. To locate a site near you, visit our website at aarp.org/taxaide or call our toll-free number 1-888-AARP-NOW (1-888-227-7669) from late January to April 15.

ADVOCATE

Find a location near you online at
http://bit.ly/OCAtaxes
or call Tax-Aide for more information at
888-687-2277

WHEN YOU COME, PLEASE BRING THE FOLLOWING:

- ☐ Copy of last year's income tax return(s)
- ☐ 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-B, etc.) showing interest and/or dividends and documentation showing original purchase price of sold assets
- ☐ 1099-MISC showing any miscellaneous income
- ☐ 1099-R form if you received a pension or annuity
- ☐ All forms indicating federal income tax paid
- ☐ Dependent care provider information (name, employer ID, Social Security number)
- ☐ All receipts or canceled checks if itemizing deductions
- ☐ Social Security cards or other official documentation for yourself and all dependents
- ☐ Photo ID
- ☐ Check with printed bank information (if Direct Deposit of Refund is requested)

NEW FOR TAX YEAR 2014!

The Affordable Care Act (ACA) requires additional information about insurance coverage for each person on a tax return. In order to have a return prepared, taxpayers need to bring the following information:

- ☐ If taxpayer purchased health insurance through the Marketplace/ Exchange, bring form 1095-A (should receive in mail by January 31)
- ☐ Health insurance coverage for taxpayer, spouse and all dependents
- ☐ If taxpayer doesn't have full-year coverage, information on monthly coverage
- ☐ Any health care exemptions received from the IRS or the Marketplace/Exchange
- ☐ Information on insurance coverage for taxpayer, spouse and for each dependent who has a filing requirement

Priority service will be provided to taxpayers based on the Tax Counseling for the Elderly Program's legislative intent. This is in no way a violation of Title VI as described below.

Under no circumstances will the Internal Revenue Service tolerate discriminatory treatment of taxpayers by its employees, or individuals who volunteer or work at Volunteer Income Tax Assistance (VITA) and Tax Counseling for the Elderly (TCE) sites. No taxpayer shall be subject to discrimination on the basis of sex, race, color, national origin, reprisal, disability or age in educational programs or activities supported by the Department of the Treasury – Internal Revenue Service. Taxpayers with a disability may require a reasonable accommodation in order to participate or receive the benefits of a program or activity supported by the Department of the Treasury – Internal Revenue Service. Site Coordinators and Managers are responsible for ensuring that requests for reasonable accommodation are granted when the request is made by a qualified individual with a disability. If a qualified taxpayer believes that he or she has been discriminated against based on sex, race, color, national origin, disability, reprisal or age, they can file a complaint with the Department of the Treasury – Internal Revenue Service. All written complaints should be sent to: Director, Civil Rights Division, Internal Revenue Service, 1111 Constitution Avenue, NW, Rm. 2413, Washington, DC 20224. For all inquiries concerning taxpayer civil rights, contact us at the address referenced above, or e-mail us at eeo.external.civil.rights@irs.gov.

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

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

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