

# Tax Assistance for Seniors

**It's that time of year again.....**

**The AARP Tax-Aide Program this year will begin on Friday , February 10, 2023 and continue through April 14, 2023. Appointments are available Fridays. Please arrive 15 minutes prior to your appointment and allow at least an hour for your appointment time. If filing a joint return, both spouses must attend unless the attending spouse has power of Attorney for financial matters.**

**Tax-Aides are volunteers and are restricted by their training and IRS and AARP regulations as to the complexity of returns they are qualified to prepare.**

**Examples of returns Tax-Aides are not trained to prepare: Partnership returns from forms K-1; business returns; self-employment returns (Schedule C) with a loss; rental income; sale of business property; S Corporation returns; trust and estate income; moving expenses; out of state returns; returns involving numerous stock transactions.**

### What to bring:

1. **REQUIRED:** photo ID & SS card/s for taxpayer & spouse; SS card for all dependents listed on return
2. Copy of last year's return.
3. All forms received showing income for 2022. This includes W-2's, interest income (may not receive 1099-INT), dividends, broker statements, social security (SSA-1099), railroad retirement, IRA distributions, pensions, gambling, sale of stock, self-employment and any other income for which you may not have received a statement. Ride-sharing drivers **MUST** provide **WRITTEN** evidence from company for claiming income and expenses.
4. All documents relating to the sale of stock, including original purchase documents.
5. If you itemize, information pertaining to deductions, i.e. medical expenses, charitable contributions.
6. Checks or data supporting quarterly prepayment of federal and state taxes.
7. Real estate tax bill.
8. All documents pertaining to the Affordable Care Act.
9. Direct deposit is recommended if a refund is due; bring a check for routing and account number information

Scheduling appointments for taxes will begin on Thursday, January 19, Friday January 20 and Monday January 23 for Bloomingdale Township seniors only. It will be in person sign-up only. No phone call appointments will be made on these 3 days. Proof of residency will be required.

Starting Tuesday, January 24, we will start taking phone calls to schedule appointments for Bloomingdale Township residents.

Non-residents can call to schedule appointments starting Monday, January 30.

### FILING REQUIREMENTS FOR MOST PEOPLE

| If your filing status is: | And at the end of 2022 you were: | Then you don't need to file a return if your gross income is less than the following, not including Social Security Income: |
|---------------------------|----------------------------------|---|
| Single                    | Under 65                         | \$12,950  |
|                           | 65 or older                      | \$14,700  |
| Married, filing jointly   | Under 65 (both spouses)          | \$25,900  |
|                           | 65 or older (one spouse)         | \$27,300  |
|                           | 65 or older (both spouses)       | \$28,700  |