AARP Tax Assistance

It's that time of year again…**FOR TAX ASSISTANCE FOR THOSE WHO NEED IT MOST**

The mission of the AARP Tax Aide program is to provide free basic tax preparation for low-to-moderate income and elderly taxpayers.

TaxAide counselors are volunteers who are restricted (by their training, and by the policies of the IRS and AARP) as to the complexity of returns they are qualified to prepare.
Examples of returns tax aide volunteers are **NOT** trained to prepare: Partnership returns from forms K1; 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.

We will be scheduling appointments, **IN-PERSON** for Bloomingdale Township Seniors, at 8:30am on: January 18th (Thursday), January 19th (Friday), January 22nd (Monday), and January 23rd (Tuesday). During these four days, phone calls will not be permitted for scheduling an appointment. Proof of residency will be required.

Starting January 24th (Wednesday) we will start taking phone calls to schedule appointments (if available) for Bloomingdale Township residents. Call 630-529-7794

Non-residents can call to schedule appointments (if available) starting January 29th (Monday). Call 630-529-7794

The AARP TaxAide Program will begin on Friday, February 9th, 2024 and continue through April 12th, 2024. Appointments will be made on 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 the appointment unless the attending spouse has Power of Attorney for financial matters.

What to bring to your scheduled appointment: (checklist will be provided during scheduling)

1. 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 2023.

4. All documents relating to the sale of stock, bond or mutual fund, including original purchase documents.

5. If you itemize, information pertaining to deductions, i.e. medical expenses, charitable contributions, separated and totaled by category

6. Information regarding 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.

If your filing status is:	And at the end of 2023 you were:	Then file a return if your gross income was at least:
Single	Under 65 65 or older	\$13,850 \$15,700
Married Filing Jointly	Under 65 (both spouses) 65 or older (one spouse) 65 or older (both spouses)	\$27,700 \$29,200 \$30,700

There is no charge for this assistance.