

AARP Foundation Tax-Aide:

Free In-Person Tax Preparation



Working for You

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



Welcoming and Free

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



IRS-Certified

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[®]

In accordance with federal law and the Department of the Treasury – Internal Revenue Service policy, discrimination against taxpayers on the basis of race, color, national origin (including limited English proficiency), disability, sex (in education programs or activities), age or reprisal is prohibited in programs and activities receiving federal financial assistance. Taxpayers with a disability may request a reasonable accommodation and taxpayers with limited English proficiency may request language assistance to access service. To report unethical behavior to IRS, email us at wi.voltax@irs.gov.

If a taxpayer believes he or she has been discriminated against, a written complaint should be sent to: Operations Director, Civil Rights Division, Internal Revenue Service, Room 2413, 1111 Constitution Avenue, NW, Washington, DC 20224. For all other inquiries concerning taxpayer civil rights, contact us at the mailing address or email us at edi.civil.rights.division@irs.gov. Do not send tax returns or other tax-related information to the Civil Rights Division office or email address.

What AARP Foundation Tax-Aide can do for you today

We offer free tax preparation help to anyone who needs it — with special attention to those who are 50 or older or have low to moderate income. AARP Foundation Tax-Aide volunteers are trained to assist you in filing many income tax forms and schedules. However, the Volunteer Protection Act requires that our volunteers stay within the scope of tax law set by the IRS for the program. In certain situations, our volunteers may be unable to provide assistance.

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 if no employees, no inventory, no losses, no depreciation, no business use of home, and no other complicating factors
- Most income reported on Form 1099-MISC
- Schedule K-1 that includes only interest, dividends, capital gains/losses or royalties
- 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 tax credits, 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
- Installment agreement request for taxes due
- Injured spouse allocation, depending on state
- Health Savings Accounts (HSA)*
- Amendments to filed returns
- Prior three tax years' returns

We cannot prepare returns with:

- Self-employment expenses that exceed \$25,000
- Complicated capital gains/losses, such as futures or options
- Rental income, except land-only rentals**
- Royalty income with expenses if not from self-employment
- Farm or farm co-op income or expenses
- Partially reimbursed employee business expenses
- Moving expenses**
- Tax on a Child's Investment and Other Unearned Income (Kiddie Tax)
- Some investment income or itemized deductions that are not included in our training
- Alternative Minimum Tax, Additional Medicare Tax, or Net Investment Income Tax
- Foreign financial asset reporting requirements

* HSA: Only when volunteer is certified in the HSA module to prepare, and another volunteer is certified to review, a return that includes HSA contributions or distributions

** Rental or moving: Can prepare for active military personnel when volunteer is certified in the military module to prepare and another volunteer is certified to review

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