The AARP Foundation Tax-Aide Program at Rufty-Holmes Senior Center prepares free tax returns for low to moderate income taxpayers, with special attention to those age 60 and older.

Appointments can be made at Rufty-Holmes Senior Center after January 29th by calling 704-216-7714.

Appointments offered Tuesdays, from February 6th through April 10th.

What to Bring to Get Your Tax Return Prepared at an AARP Tax-Aide Site

First, note that we CANNOT prepare your return if you:

1. **Owe any special taxes (such as alternative minimum tax or household employment taxes)**
2. **Have business income with a net loss OR with expenses over $25,000**
3. **Have farming income – or have rental income with any expenses or depreciation**
4. **Are a minister or are any other clergy with a parsonage/housing allowance**
5. **Are due a health coverage credit with form 1099-H – or cancellation of mortgage debt on form 1099-C.**
6. **Want to claim a home office, have loss with bankruptcy, are in military, or want to get an adoption credit**

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1. Bring **Photo Identification** for you and your spouse and **Tax Identification** for you, your spouse, and all dependents. **Tax Identification must be one of the following**:

   (1) Social Security card, or
   (2) Social Security statement of benefits (SSA-1099), or
   (3) Verification letter from the Social Security Admin., or
   (4) Medicare card ending with the letter **A**, or
   (5)ITIN Letter

   (We cannot accept (1) other Medicare cards, (2) military IDs, (3) last year's tax return, etc.)

** **2.** *****A printed copy of last year's Federal and NC tax returns and (if available) accompanying tax documents** *****

3. **All** "Tax Document" forms received for **2017** tax year
   a. Statement of Social Security benefit (SSA-1099)
   b. State tax refund statement (usually on a post card)
   c. W-2 forms from each employer and W-2G (gambling winnings)
   d. 1099 forms: 1099-INT, 1099-DIV, 1099-R (pensions, IRAs, 401Ks), 1099-MISC, 1099-G (unemployment compensation, 1099-S (sale of home), RRB-1099 (railroad retirement), etc.
   e. Form 1095-A, exemption letter/certificate, and any forms related to the Affordable Care Act (Premium Tax Credit or Shared Responsibility Payment). If anyone in your household did not have Medicare or other health insurance coverage, you will also need to bring information on the income of each member of the household
   f. Form 1098-T and documentation on scholarships & **all** education expenses (including who paid which expenses)
   g. Any other papers labeled "Tax Documents" that you received in the mail
4. Interest and/or dividend records not on a 1099
5. All forms and/or records indicating federal & state income taxes paid not already listed, such as estimated tax payments
6. Records on any business or self-employed income and all associated expenses (including non-commuting mileage)
7. If you have sold any stocks, bonds, or mutual funds we need to know **how acquired** (purchased, received as gift, inherited), **cost**, **date of purchase**, and the 1099-B brokerage statement (which shows the sale price & date of sale)
8. Child care provider information (name, employer ID/ SSN, address) and record of amounts paid for each child
9. List of charities and amounts donated by check or cash (with receipts) to each. Also, details on non-cash contributions
10. If you expect to itemized deductions (must be more than your standard deduction: Single: $6,350 under age 65, $7,900 65 or older, Married Couple: $12,700 - $15,200), then bring an organized list of deductions (as mortgage interest and insurance, property & vehicle taxes, medical expenses, charitable contributions, non-cash donations etc.). This form is available at the Senior Center to help you organize your material: "**ItemizedDeductionsIntake&ClientTakeHomeList**"
11. Any other documents that might affect your tax return, such as student loan interest, alimony, possible energy credits (including past energy credit dates and amounts 2006-2016), repayment of first-time homebuyer credits from 2008 (or 2009 if the home ceased to be the main home within 36 months), gambling winnings/losses, HSA contributions, etc.
12. A blank check (or a legible photo copy of a check) if you would like direct deposit or direct debit. Will be returned to you. (Deposit slips are NOT an acceptable alternative)

To contact someone in the Tax-Aide program after tax season, call this Rufty-Holmes Senior Center number: **704-216-7714**.