

Appointment Scheduling starts January 29, 2024 for the AARP Tax Preparation Program (AARP TaxAide)

Area volunteers will be providing free assistance to taxpayers with their 2023 Federal, State of Ohio and Ohio School District tax returns at Way Public Library, Perrysburg, Ohio, from February 6, 2024 through April 9, 2024. All returns are filed electronically.

Starting Monday, January 29, 2024 through Friday, February 2, 2024 appointments can be made any day by contacting the tax preparation site at 419-874-3135, Press 2, from 9:30a.m. - 3:00p.m.

Starting the week of February 5, 2024 appointments can be made **only** on Tuesdays, Wednesdays and Thursdays by contacting the tax preparation site at 419-874-3135, Press 2, from 9:30a.m. - 3:00p.m.

The tax site will be closed on Mondays, Fridays, Saturdays and Sundays. If you choose to leave a voicemail please leave only one. We will return your call. Multiple voicemails slow down our response time in getting back to you.

AARP will be using the Drop Off Model for doing taxes. Participants are required to commit to **TWO** appointments. A brief initial intake appointment where you will leave all your documents with us, and a second appointment one week later to review and receive your completed tax return and your dropped off documents.

Participants will need to pickup the TaxAide Envelope Packet before their first appointment. You can pick one up on the days we are open (Tuesday, Wednesday, Thursday) or at least 30 minutes before your appointment so that the Intake/Interview form and all three Consent forms can be completely filled out before your appointment begins.

The following are **within the scope** of this service:

Earned Income Credits, Child Tax Credits, Unemployment Benefits, Child and Dependent Care Expenses, Debt Cancellation, Education Credits, IRA Contributions, Capital Gains/Losses, Disability Income, Affordable Care Act (ACA)

The following are **outside the scope** of this service:

Non-Ohio state returns, any city tax returns, complex tax issues including depreciation, multiple broker statements (1099-B's), casualty losses, complex K-1's, farm income, military returns, employee business expenses over \$5,000, any digital currency (Bitcoin etc.) transactions and multiple W2's

Taxpayers MUST BRING the following documents to their first appointment:

Copy of Drivers License with photo ID or State Identification Card is **required** for **all taxpayers**

Copy of Social Security cards for yourself, your spouse and all dependents is **required** for **all taxpayers**

Previous year's tax return

Voided blank check (not a deposit slip) if you want to direct deposit any refund(s) or direct debit any amounts due

13614-C, Intake/Interview booklet with the 3 Consent Forms (**completely filled out**) (included in your TaxAide Envelope Packet)

You must have **ALL APPLICABLE** documents listed below at the **first** appointment

Please have all documents out of envelopes and organized

Electronic documents are not accepted - please have a printed copy

Income:

Current W2's, Wage and Tax Statement from each employer
W-2G, Certain Gambling Winnings
SSA-1099, Social Security Benefit Statement (benefits paid to you for the year) or
RRB-1099, Tier 1 Railroad Retirement Benefit Statement
1099-C, Cancellation of Debt Statement
1099-G, Certain Government Payments - for unemployment compensation or state/local income
tax refunds
1099 Statement reporting Interest (1099-Int), Dividends (1099-Div), Proceeds from Sales (1099-B),
as well as documentation showing the original purchase price of your sold stocks or other assets
1099-R, Distributions from Pensions, Annuities, Retirement or Profit-Sharing Plans, IRA's,
Insurance Contracts, etc
1099-NEC, Non Employee Compensation
1099-MISC, Miscellaneous Income Statement or other 1099 forms

Payments:

Records of any federal and/or state and/or local income tax paid (including quarterly estimated tax
payments) if not shown on income documents

Deductions (if itemizing):

Fill out the "2023 Itemized Deductions (Sch A) Worksheet" (included in your TaxAide Envelope Packet)
Large medical expenses may help reduce State and School District taxes even if you do not itemize
deductions on the federal tax return

Health Insurance:

1095-A, Health Insurance Marketplace Statement (Exchange)
1095-B, Health Coverage
1095-C, Employer-Provided Health Insurance Offer and Coverage

Credits:

Dependent care provider information - name, address, phone number and employer ID or
Social Security number and amount paid to provider
1098-T, Tuition Statement - for education expenses plus statement of account from the
education institution showing tuition and fees actually paid and scholarships, grants,
etc. received (must be printed out). Also bring a summary of any other education expenses
1098-E, Student Loan Interest Statement
Energy Efficient Home Improvement Credit

Other:

Any additional documentation you feel is pertinent

Remember you are responsible for the information on your tax return

Please provide complete and accurate information