

FREE TAX PREPARATION AND FILING

Sponsored by AARP Foundation

- All taxpayers are welcome with emphasis on taxpayers age 60 and older.
- AARP membership is not required.

For filing tax returns during the COVID-19 epidemic, we will be following new procedures:

- **Appointments are required. No walk-ins will be allowed. To make an appointment, call 317-689-8519.**
- To minimize physical contact, tax volunteers will securely scan tax documents during the appointment. Tax preparation will be completed off-site.
- The steps for completing, reviewing, and filing the tax return will be discussed during the appointment and scanning processes.
- Tax service schedules will be subject to current medical guidelines.
- **Due to Carmel Library construction, all meetings will be conducted at the Monon Community Center (1235 Central Park Drive East).**
- **For questions or to make an appointment, call 317-689-8519.**

We are not approved to prepare the following returns:

- Self-employment with expenses exceeding \$35,000, home office expense, ACA premium, or a net loss
- Rental income or depreciation
- Income, deductions, or credits outside our scope (If uncertain about complexity, please call the above number)

As part of the effort to prevent identity theft, the IRS requires us to check the ID of every taxpayer (including spouse for joint returns).

The following documents will be required to complete a tax return:

- Copy of last year's tax return and Social Security card(s)
- W-2 forms from each employer
- 1099-G Unemployment compensation forms
- 1095-A from the ACA health insurance marketplace (if applicable)
- SSA-1099 forms if received Social Security benefits
- All 1099 forms (1099-INT, 1099-DIV, 1099-B, etc.) showing interest and/or dividends and documentation for original purchase price and date of assets sold
- 1099-MISC/1099-NEC for miscellaneous or self-employment income
- 1099-R forms for income from a pension, annuity, or IRA distribution
- If self-employed a tabulated total of cash income and expenses
- All forms indicating federal and state income tax paid
- Dependent care provider information (name, address, employer ID or Social Security number, amount paid)
- 1098-T form for college education expenses
- Names, dates of birth, and Social Security cards for all dependents
- Homeowners - amount of real estate taxes paid in 2020
- Renters - amount of rent paid in 2020, name and address of landlord
- Any other tax forms received
- Driver's license, state ID, or passport (both taxpayers if joint return)
- Bank routing and account # for refunds