

AARP E – Filing Tax Assistance

If you need to file State and Federal Income Taxes, as well as the Homestead Property Tax Credit and/or the Home Heating Credit, AARP volunteers will be available (by appointment only) at the Marquette Senior Center beginning in February. March appointments will open up mid-February. Call the Center for details.

APPOINTMENTS NOW AVAILABLE – CALL 228-0456 TODAY!

Please bring the following items with you to your appointment:

1. If filing a joint return **BOTH PARTIES MUST BE PRESENT** with *photo identification*.
2. If the taxpayer is homebound, a power of attorney should be presented for the individual. Contact the Marquette Senior Center for assistance.
3. A copy of your completed 2016 tax return.
4. Social Security **CARDS** for all persons on the return.
5. W-2 for all jobs worked.
6. 1099 INT. This shows interest earned this may also be shown on a 1099R.
7. 1099 DIV. This shows any dividends earned and may also be shown on a 1099R.
8. Written documentation of any self-employed business expenses and income including cash income.
9. 1099B – Capital gains or losses. You must have the cost basis of any stocks or mutual funds that were sold.
10. 1099R – showing any IRA distributions pensions or annuities.
11. 1099G – Unemployment compensation.
12. SSA 1099 – Social Security and railroad benefits.
13. 1099 MISC – any miscellaneous income.
14. W-2 G – Gambling winnings.
15. If you itemize deductions, you must have written proof of all deductions.
16. 1095A – this form will arrive if you purchased your healthcare insurance through the marketplace.
17. If you have an exemption from the affordable care, act you will need to provide the exemption certificate.
18. You must provide a blank or canceled check in the name of the taxpayer for us to obtain the correct routing and account information. An alternative would be a letter signed by a bank employee on bank stationary listing the routing and account numbers.
19. To do the property tax credit we need copies of the amount of property tax **assessed** for 2017 and the taxable value of the home. If you rent, we need to know the name and address to whom you pay the rent and how much.
20. For the home heating credit, we need the amount you paid for heating during the year from your provider. If you heat with wood, we need to know the amount you paid for the wood.

We (AARP) do not retain any personal information.

Returns AARP cannot do

Rental income, farm credits, business except for CEZ forms, very complicated stock sales or **other returns we are not comfortable or trained to complete.**