

FREE TAX HELP

TAX-AIDE

Free tax assistance for those who need it most

The AARP Tax-Aide program, administered by the AARP Foundation in cooperation with the IRS, provides free income tax assistance to ALL taxpayers.

Volunteers will assist in preparing basic federal and Oregon tax forms for personal tax returns. They can assist with most of your everyday tax situations including Affordable Care Act forms, Health Savings Account forms and filing for Earned Income Tax Credit Assistance.

However, volunteers cannot help you if you:

- have a business or hobby with employees, inventory, losses, or expenses over \$25,000
- want to file Married Filing Separately (not applicable for Oregon sites)
- have rental income from land with a structure
- donated a motor vehicle, boat or airplane

There are other complicated tax situations that may be beyond the scope of the AARP volunteers. Check with the site's Local Coordinator during tax season to see if your return is considered Out of Scope. If so, you may have to seek tax advice from a paid tax professional.

Tax returns are electronically filed as a free service by Tax-Aide.

Please see the reverse side for "what to bring" to the site. Please have all your documents in order before you go to the site.

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Print tax forms 24/7 at www.irs.gov.

Visit your local library during open hours for assistance in getting printed forms.

FREE ASSISTANCE is available at the following locations February 1 through April 16.

Sites will **open and close** at the hours shown. At most sites you can sign in 30 minutes BEFORE opening time. Tax returns will NOT be started **one hour** BEFORE closing time.

Klickitat County (WA)

Goldendale Grange Hall

228 E Darland, Goldendale WA 98620
Fridays & Saturdays, February 2 – April 14, 9 am – 12 pm
By appointment only, call Senior Services at 509-773-3757.

White Salmon Pioneer Center

501 NE Washington St., White Salmon WA 98672
Tuesdays, February 6 – April 10, 9 am – 12 pm
By appointment only, call Senior Services at 509-493-3068

Skamania County (WA)

Stevenson Community Library

120 NW Vancouver Avenue, Stevenson WA 98648
Saturdays 11 am – 3 pm (2/3, 2/17, 3/3, 3/17, 3/31, 4/14)
Call the library directly for an appointment at 509-427-5471

Hood River County (OR)

Hood River County Library

502 State Street, Hood River OR 97031
Mondays 2-6 pm
Spanish & English

Hood River Valley Adult Center

2010 Sterling Place, Hood River OR 97031
Thursdays 2-6 pm
Spanish & English

Sherman County (OR)

Rufus Community Center

304 W 2nd St, Rufus OR 97050
Saturdays by appointment. Please call 541-993-1054.

Wasco County (OR)

Mid-Columbia Senior Center

1112 W 9th St, The Dalles OR 97058
Fridays 2-6 pm
Saturdays 9 am – 1 pm
Spanish & English

Tygh Valley Community Center

57594 Tygh Valley Rd, Tygh Valley OR 97063
Thursdays 9 am – 1 pm

WHAT TO BRING?

You MUST bring in:

- Last year's tax return.
- Bank information (check from checkbook, letter from the bank) showing the routing number and account number for automatic deposit of your refund, or withdrawal of your tax bill, if you want the refund or payments to be automatic. A voided check is not required.

IDENTIFICATION

- Government-issued photo identification for the taxpayer and the spouse, even if both are NOT present at the time of the return being prepared. **Note: This is a NEW requirement.**
- Social Security identification card (original, photocopy, or photo on a smart phone or tablet). Medicare card with "A" is also acceptable. Other tax documents may be acceptable if it has the FULL social security number (9 digits) printed on the form.
 - This is needed for the taxpayer and each person that will be listed on the tax return, e.g. spouse, children, parent, or relative that may be listed as a dependent.
 - If a social security number has not been issued, provide a current and valid letter or card for ITIN or ATIN.

INCOME: All tax documents or statements that show income received by you and your spouse.

Examples are, but are not limited to, the following:

- W-2 (wages), 1099-INT (interest), 1099-DIV (dividends), SSA-1099 (social security income), 1099-R or RRB-1099 (retirement income), 1099-MISC (miscellaneous income) and W-2G (gambling income).
- 1099-B (consolidated brokerage statement) that shows the date and price of acquisition and sale of capital assets such as stocks and bonds.

EXPENSES: All tax documents or itemized statements that show expenses incurred by you and your family. Examples are, but are not limited to, the following:

- Medical copays, receipts for prescriptions, and mileage to and from the medical facilities.
- Receipts for donated items showing the date and value, and mileage for your charitable organizations.
- 1098 Mortgage Interest Statement showing interest and property taxes paid (if property taxes are not listed, bring in the County Tax Assessment bill).
- Bill of sale for vehicles, boats or major home improvements, with the sales tax paid on the receipt.

OTHER (if applicable)

- Education expenses including the 1098-T, the account statement, and expense statement from the college if the student has higher education expenses.
- Health care coverage forms e.g. 1095-A, 1095-B, 1095-C, or 1099-SA (HSA).
- To claim dependent or child care, provide the caregiver's name, address, payments, and the Employer Identification Number (EIN) or Social Security Number (SSN).