

Overview of AARP Foundation Tax-Aide Services

AARP Foundation Tax-Aide offers free tax preparation of basic Federal and State returns for low to middle income taxpayers with an emphasis on Seniors 60 and older

- 1) Determine If You Are Eligible For Tax Preparation With AARP Foundation Tax-Aide
 - a) You and your spouse are US citizens or have an ITIN
 - b) You and your spouse lived in Wisconsin all year
 - c) If you or your spouse had jobs, your income was only from Wisconsin
 - d) You did not get married or divorced in 2020
 - e) If you are married, you will file jointly and both spouses are able to attend two appointments (tax-aide cannot file taxes if you are married filing separately)
 - f) You are willing to sign a consent form authorizing AARP Foundation Tax-Aide Volunteers to scan your tax documents and prepare your taxes online (you will keep your paper tax documents)

- 2) Schedule an Appointment by emailing laxtaxquestions@gmail.com and you will receive an automatic reply with the scheduling website
 - a) Appointments will not be scheduled over the phone and no drop ins will be accepted
 - b) Appointment scheduling begins **February 9, 2021**
 - c) Appointments will be available from 9:00-4:00 Tuesdays, Wednesdays and Thursdays from February 16-April 1
 - d) Appointments will be at the **La Crosse Center Lobby on 2nd Street** (300 Harborview Drive)
 - e) Taxpayer(s) need to attend 2 appointments, each lasting about 30 minutes, scheduled 7 days apart
 - f) **Schedule the first appointment online**
 - g) **The second appointment will be scheduled during your first visit at the La Crosse Center**
 - h) If married, both taxpayers must attend both appointments
 - i) COVID-19 restrictions will be strictly enforced and masks are mandatory
 - i) If you feel sick, cancel your appointment by using the link provided in the confirmation email you received from AARP
 - ii) Cancellations cannot be done by phone
 - j) If you need assistance with online navigation of the appointment website, call 608-492-0113

- 3) Pick Up Intake Documents at the Main La Crosse Public Library Lobby and **Fill Out These Documents as Thoroughly as Possible Before You Come To Your Appointment**
 - a) Form 13614-C
 - b) 2020 Wisconsin Tax-Aide Information Sheet

4) Gather Important Documents To Bring To Your Appointments

- a) Social Security Cards for all Taxpayers and Dependents
- b) Government issued Photo ID for all Taxpayers such as a driver's license, Passport, WI Identification card, University/College photo ID
- c) Cancelled check if you want direct deposit
- d) 2019 Tax Return
- e) All income statements including SSI, Social Security Form SSA-1099, 1099 R's, W-2's, Interest and Dividend statements, Brokerage Statements, etc.
- f) Student Loan Interest Statement
- g) College Tuition Form 1098-T
- h) Information about child or dependent care expenses
- i) Signed Rent Certificate or Property Tax statement if you are applying for Homestead Credit
- j) Disability statement if you are applying for the Homestead Credit, are under 62 years old, and have no earned income
- k) Form 1095-A if your Health Insurance is from the MarketPlace
- l) All other tax documents you receive from the IRS
- m) **NEW THIS YEAR: The amount of stimulus payments you received in Spring 2020, and January 2021; amounts can be found by looking at your bank statements**

5) La Crosse Center Parking

- a) **La Crosse Center Ramp** at 201 Jay Street has 3 free hours of parking per day
- b) **Riverside Municipal Parking Ramp** at 424 2nd Street S has unlimited free parking
- c) **Limited Street Parking**

Beginning February 9th, if you have **general questions** about AARP Foundation Tax-Aide services, email laxtaxquestions@gmail.com. If you **need assistance with navigating the online scheduling software**, call **608-492-0113**.

Do **not** call the La Crosse Center

Do **not** call the La Crosse Public Library

Unfortunately, due to COVID-19 limitations, AARP Foundation Tax-Aide will offer significantly fewer appointments compared to previous years