

AARP Foundation Tax-Aide at Middletown First Baptist Church

11721 Main St, Louisville, KY 400243

Site Information Line 502-208-6118 ky1.taxaide.aarpfoundation.org

1. PHOTO ID and SOCIAL SECURITY IDENTIFICATION are REQUIRED.

This means that you bring either your SOCIAL SECURITY CARD or your SOCIAL SECURITY BENEFIT STATEMENT for you and (if you have one) your spouse.

2. Bring social security cards for anyone else on the tax return – kids, grandkids, anyone who you provide support for, dependents.
3. Bring your social security benefit statement – if you and/or your spouse receive social security. It shows the dollar amount received last year. If you received a lump sum distribution this year from social security for prior years, bring tax returns from those year(s). They will be required to determine the taxable part of social security!
4. Banking information will speed up your refund by six weeks! Bring a check (not a deposit ticket) to show your bank routing and account information. THIS IS NEW THIS YEAR DUE TO IRS CHANGES!
5. Bring last year's 2024 tax return. The 2023 tax return might also be helpful.
6. Fill out the attached / enclosed "Intake and Interview" form. Please fill this form in BEFORE you come to the site. Filling it in at the site will make the process longer for you. We do federal and Kentucky returns. No other state returns
7. Bring all your tax documents and any paperwork that affects your tax return.
8. Our "front desk" volunteers will briefly review your documents and organize them.
9. A Tax Preparer will review your photo id, social security cards and forms, the "Intake and interview" form and all other tax forms to determine if we can do your return.
10. If we can do your return, we will prepare your return and a second Tax Preparer will then meet with you to go over the return in detail again. This is what we call a Quality Review.

If we cannot do your return, we will tell you why and return all your documents to you.

11. Your tax return will be printed and reviewed with you. You will be asked to sign an 8879 IRS form that tells the IRS "under penalty of perjury your return is true, correct and complete."

This 8879 form also authorizes the site to electronically file your federal and Kentucky state tax return. Your return will be e-filed shortly following your approval and after you sign the 8879 document.

12. All of your documents, including your printed tax return, will be returned to you.
13. If you are requesting us to prepare a tax return from a prior year such as 2024, 2023 or 2022, there are requirements other than that listed above. One appointment per tax return. Hopefully, you had a conversation with the site manager before coming to the site.

How AARP Foundation Tax-Aide Can Help You Today

We offer free tax return preparation to anyone who needs it. AARP Foundation Tax-Aide volunteers are trained to help you file a variety of income tax forms and schedules.

In certain situations, however, our volunteers may be unable to provide assistance. The Volunteer Protection Act requires that our volunteers stay within the scope of tax law and policies set by the IRS and AARP Foundation. Here's a guide to what our Tax-Aide volunteers can — and can't — do.

We can prepare most returns with:

- Wages, interest, dividends, capital gains/losses, unemployment compensation, pensions and other retirement income, Social Security benefits.
- Self-employment income, with limits.
- Schedule K-1 that includes only interest, dividends, capital gains/losses, royalties, or foreign taxes (within limits)
- Qualified Business Income deduction.
- New qualified tips, overtime, vehicle loan interest and senior deductions.
- Itemized deductions, including noncash contributions to charity that total no more than \$5,000.
- Cancellation of nonbusiness credit card debt.
- IRA contributions — deductible or not.
- Most credits, such as earned income credit, education credits, child/additional child credit and credit for other dependents, child/dependent care credit, premium tax credit, simplified method foreign tax credit and retirement savings credit.
- Estimated tax payments.
- Injured spouse allocation, depending on state.
- Health Savings Accounts (HSA).
- Amendments to filed returns.
- Certain prior year tax returns.

We can't prepare returns with:

- Self-employment if there are employees, losses, expenses that exceed \$50,000, depreciation, business use of home, 1099 filing requirements or other complicating factors.
- Hobby income or other activities not for profit
- Complicated capital gains/losses, such as futures or options.
- Complicated Schedule K-1.
- Rental income, except land-only rentals or rentals of personal residence less than 15 days.
- Royalty income with expenses if not from self-employment.
- Tax on a Child's Investment and Other Unearned Income (Kiddie Tax).
- Farm income or expenses.
- Some investment income or itemized deductions that are not included in our training.
- Alternative Minimum Tax, Additional Medicare Tax, or Net Investment Income Tax.
- Foreign financial asset reporting requirements.
- Form 1099-DA and certain other digital asset transactions (including virtual currency).
- Solar energy credits.
- Clean vehicle credits.

AARP Foundation Tax-Aide - Tax Preparation
Documents We Need to Prepare Your Tax Return

PLEASE NOTE: You MUST provide items #1 and item #2; #3 if you have any dependents. If you do not provide them, we cannot prepare your return. **Provide all other items that are applicable to you.** Please look at your last tax return (2024 or 2023) and make certain that you either have 2025 tax forms from every person / organization from which you received one in the prior year or know why you do not have that form for 2025.

Item	Form or Document	Description and Notes
New item	Did you receive reported tip income this year?	Some tip income is not taxable.
New item	Were you paid overtime ? You need to tell us how much money you made from overtime pay.	Overtime is not taxable up to \$25,000 in some cases.
New item	Did you pay loan interest on a new vehicle purchased in 2025?	Bring the VIN of the vehicle and how much interest that you paid. This reduces your taxable income.
1	Government-issued photo ID for you (and your spouse if married filing jointly) -- front and back	Driver's license, passport, military or other government ID card
2	Front of your Social Security card OR ITIN number (and that of your spouse, if married filing jointly)	ITIN numbers should be supported by an issuing letter
3	Front of the Social Security card OR ITIN number for each of your dependents on your return	ITIN numbers should be supported by an issuing letter
4	Your most recent Federal tax return (2024 if filed, 2023, or 2022 if you have not yet filed for 2024)	Form 1040 and related Schedules. We don't need your tax forms (i.e. 1099-R or W-2) for prior years
5	Form W-2 - Wages / Salary from employment	One from each employer. These show your wages or salary received and taxes withheld for the year
6	Proof of bank account routing and account numbers for direct deposit (this is the fastest and safest way to receive your refund) or direct debit (if you owe taxes)	Please provide a voided check or other documentation with your bank's name, routing number, and your account number; not deposit slips as they may have different routing number
7	Information regarding any estimated tax payments you made to the IRS or your State	
8	Form 1095-A - Health Insurance Marketplace Statement	If you or anyone on your tax return had medical insurance coverage through the Marketplace (Obamacare, KNECT), information from your Form 1095-A MUST be included on your tax return
9	Form 1099-G - Certain Government Payments - State income tax refunds	
10	Form 1099-G - Certain Government Payments - Unemployment compensation	If you received unemployment benefits in 2025 but did not receive a tax form, contact your State's unemployment office to obtain this information
11	Form 1099-INT - Interest Income	You may receive these from your bank, credit union, investment firm, etc.
12	Form 1099-DIV - Dividends and Distributions	You may receive these from your broker, mutual funds, insurance companies or other sources
13	Form 1099-R - Distributions from Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.	Income distributed from any of these plans. This form will also report any roll over distributions.

AARP Foundation Tax-Aide - Tax Preparation
Documents We Need to Prepare Your Tax Return

14	Form SSA-1099 - Social Security Benefit Statement	Statement showing benefits received in 2025
15	Form RRB-1099-R - Annuities or Pensions by the Railroad Retirement Board	Retirement or pension income from you or your spouse's railroad retirement
16	All information related to itemized deductions	Donations, Property tax, Home loan interest, etc.
17	Information regarding child or dependent care you paid	Provide the name, address, and EIN/SSN of the care provider, amount paid, and for which child
18	Form W-2G - Certain Gambling Winnings	This includes casino, bingo, or lottery winnings for which you received a W-2G
19	Amount of any gambling winnings not reported on Form W-2Gs	This includes casino, bingo, or lottery winnings for which you did not receive a W-2G
20	Amount of any gambling losses for the tax year, if you had gambling winnings	
21	Capital gains information	Brokerage statements, etc., showing your stock, bond, or other investment transactions
22	Form 1098-T - Tuition Statement and / or Form 1099-Q (section 529 Savings Plan)	You will receive this document from educational institutions attended by you, your spouse, or your dependents
23	Information regarding education expenses	
24	Cancellation of Debt Form 1099-C	For non-business credit card debt ONLY
25	Form 1099-MISC - Miscellaneous Information	Reflects income received from royalties, rents, prizes or awards, or medical and health care payments.
26	Form 1099-NEC – Non-employee Compensation	Reflects income received for work performed as an independent contractor or for self-employment.
27	Expenses and mileage information related to your self-employment	
28	Documentation of all cash income you received	All cash income is reportable and subject to tax; do not include any income you received that is reflected on one of your other tax documents
29	Form 1099-K - Payment Card and Third Party Network Transactions	You may receive this form if you performed for-hire driving services or received income through a third-party payment network (you might receive this form if you drove for Uber, Lyft, DoorDash, GrubHub, etc.)
30	Form 1099-S – Proceeds from Real Estate Transactions	You may receive this form if you sold a home, residence, or real estate
31	Schedule K-1s Form 1065 (Partnerships) Form 1120-S (S-Corporations)	Partnerships & S-Corporation will file a copy of Schedule K-1 with the IRS to report your share of Interest, Dividends, Capital gains/losses, etc.
32	Information regarding alimony you paid or received last year	We will need the name of your former spouse and their Social Security number
33	Forgiveness of Main Home Mortgage - Form 982	If part or all of your mortgage was forgiven / cancelled, you will have this form from the lender
34	Residential Energy Credits	A 4-digit Qualified Manufacturer ID Number (QМИD) is required for qualifying exterior windows/skylights & doors, furnace/AC, heat pump, water heater, etc.

Intake/Interview and Quality Review Sheet**You will need:**

- Tax Information such as Forms W-2, 1099, 1098, 1095.
- Social Security cards or ITIN letters for all persons on your tax return
- Picture ID (such as valid driver's license) for you and your spouse

- Complete pages 1-5 of this form.
- You are responsible for the information on your return. Provide complete and accurate information.
- If you have questions, ask the IRS-certified volunteer preparer.

Volunteers are trained to provide high quality service and uphold the highest ethical standards. To report unethical behavior to the IRS, email us at ts.voltax@irs.gov

Your first name	M.I.	Last name	Your date of birth	Your job title
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Spouse's first name	M.I.	Last name	Spouse's date of birth	Spouse's job title
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Mailing address	Apt #	City	State	ZIP code
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Your telephone number	Spouse's telephone number	Email address (optional)	Did you live or work in two or more states in 2025	
		<input type="checkbox"/> Yes <input type="checkbox"/> No		

Can anyone else claim you or your spouse on their tax return			<input type="checkbox"/> Yes	<input type="checkbox"/> No
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Check if you or your spouse were in 2025:			Legally blind			<input type="checkbox"/> You	<input type="checkbox"/> Spouse	<input type="checkbox"/> No
A U.S. citizen <input type="checkbox"/> You <input type="checkbox"/> Spouse <input type="checkbox"/> No			Totally and permanently disabled			<input type="checkbox"/> You	<input type="checkbox"/> Spouse	<input type="checkbox"/> No
In the U.S. on a visa <input type="checkbox"/> You <input type="checkbox"/> Spouse <input type="checkbox"/> No			Issued an identity protection PIN (IPPIN)			<input type="checkbox"/> You	<input type="checkbox"/> Spouse	<input type="checkbox"/> No
A full-time student <input type="checkbox"/> You <input type="checkbox"/> Spouse <input type="checkbox"/> No			Owners or holders of any digital assets			<input type="checkbox"/> You	<input type="checkbox"/> Spouse	<input type="checkbox"/> No

If due a refund , how would you like your refund			If you have a balance due , how would you like to make your payment		
<input type="checkbox"/> Direct deposit <input type="checkbox"/> Check by mail			<input type="checkbox"/> Bank account <input type="checkbox"/> IRS.gov Direct Pay		
<input type="checkbox"/> Split refund between accounts <input type="checkbox"/> Other _____			<input type="checkbox"/> Set up installment agreement <input type="checkbox"/> Mail payment to IRS		

Would you like to receive written communications from the IRS in a language other than English			<input type="checkbox"/> You	<input type="checkbox"/> Spouse	<input type="checkbox"/> No
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What language _____			<input type="checkbox"/> You	<input type="checkbox"/> Spouse	<input type="checkbox"/> No
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Would you, or your spouse if married filing jointly, like \$3 to go to the Presidential Election Campaign Fund			<input type="checkbox"/> You	<input type="checkbox"/> Spouse	<input type="checkbox"/> No
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As of December 31, 2025, what was your marital status			<input type="checkbox"/> Yes	<input type="checkbox"/> No
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<input type="checkbox"/> Never Married <input type="checkbox"/> Married If married, were you married on the last day of the year			<input type="checkbox"/> Yes	<input type="checkbox"/> No
Did you and your spouse live apart all of the last 6 months of the year			<input type="checkbox"/> Yes	<input type="checkbox"/> No

<input type="checkbox"/> Divorced <input type="checkbox"/> Legally Separated but not Divorced			<input type="checkbox"/> Widowed
Date of final decree _____ Date of separate maintenance decree _____			Year of spouse's death _____

List the names below of everyone who lived with you last year (except your spouse) AND anyone you supported but did not live with you last year.					Answer Yes or No (Y/N)				To be completed by certified volunteer (Yes, No, or N/A)				
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Name (first, last)	Date of birth (mm/dd/yy)	Relationship to you (child, parent, none, etc.)	Number of months lived in your home in 2025	Single or Married as of 12/31/2025 (S/M)	U.S. Citizen	Resident of U.S., Canada or Mexico	Full-time student	Totally and permanently disabled	Issued IPPIN	Qualifying child or relative of any other person	This person provided more than 50% of their own support	This person had less than \$5,200 of income	Taxpayer(s) provided more than 50% of support for this person	Taxpayer(s) paid more than half the cost of maintaining a home for this person

Income: Answer the following questions on the left side of this page. Check only the boxes that apply to you and/or your spouse.

Received money from any of the following in 2025:	(To be completed by certified volunteer) Income to be included	Notes/Comments
<input type="checkbox"/> (B) Wages as a part-time or full-time employee How many jobs _____	<input type="checkbox"/> (B) W-2s	# _____
<input type="checkbox"/> (B/A) Tips	<input type="checkbox"/> (B/A) Tips (Basic when reported on W2)	
<input type="checkbox"/> (B/A) Retirement account, pension or annuity proceeds	<input type="checkbox"/> (B/A) 1099-R (Basic when taxable amount is reported) # _____	
	<input type="checkbox"/> (A) Qualified Charitable Distribution From 1099-R	\$ _____
<input type="checkbox"/> (B) Disability benefits (such as payments from insurance and worker's compensation)	<input type="checkbox"/> (B) Disability benefits on 1099-R or W-2	# _____
<input type="checkbox"/> (B) Social Security or Railroad Retirement Benefits	<input type="checkbox"/> (B) SSA-1099, RRB-1099	# _____
<input type="checkbox"/> (B) Unemployment benefits	<input type="checkbox"/> (B) 1099-G	# _____
<input type="checkbox"/> (B) Refund of state or local income tax	<input type="checkbox"/> (B) Refund	\$ _____
	<input type="checkbox"/> (B) Itemized last year	<input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="checkbox"/> (B) Interest or dividends (bank account, bonds, etc.)	<input type="checkbox"/> (B) 1099-INT # _____	<input type="checkbox"/> (B) 1099-DIV # _____
<input type="checkbox"/> (A) Sale of stocks, bonds or real estate Did you report a loss on last year's return <input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> (A) 1099-B (include brokerage statement)	# _____
<input type="checkbox"/> (B) Alimony	<input type="checkbox"/> (B) Alimony	\$ _____
	Excluded from income	<input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="checkbox"/> (A/M) Income from renting out your house or a room in your house If yes, did you use the dwelling unit as a personal residence and rent it for fewer than 15 days <input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> (A/M) Rental income (Advanced when the dwelling is a personal residence and rented for fewer than 15 days)	
	<input type="checkbox"/> Rental expense	\$ _____
<input type="checkbox"/> Income from renting personal property such as a vehicle		
<input type="checkbox"/> (B) Gambling winnings, including lottery	<input type="checkbox"/> (B) W-2G or other gambling winnings (list losses below if taxpayer can itemize deductions)	# _____
<input type="checkbox"/> (A) Payments for contract or self-employment work Did you report a loss on last year's return <input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> (A) Schedule C	
	<input type="checkbox"/> 1099-MISC	# _____
	<input type="checkbox"/> 1099-NEC	# _____
	<input type="checkbox"/> 1099-K	# _____
	<input type="checkbox"/> Other income reported elsewhere	
	<input type="checkbox"/> Schedule C expenses	\$ _____
<input type="checkbox"/> Any other money received during the year? (example: cash payments, jury duty, awards, digital assets, royalties, union strike benefits)	<input type="checkbox"/> Other income (see Pub 4012 for guidance on other income, i.e., scope of service chart)	

Expenses and Tax Related Events: Answer the questions on the left side of this page. Check only the boxes that apply to you and/or your spouse.

Paid any of the following expenses to itemize in 2025?	(To be completed by certified volunteer) Standard or Itemized Deductions	Notes/Comments
<input type="checkbox"/> (A) Mortgage Interest <input type="checkbox"/> (A) Taxes: state, local, real estate, sales, etc. <input type="checkbox"/> (A) Medical, dental, prescription expenses <input type="checkbox"/> (A) Charitable contributions	<input type="checkbox"/> (A) 1098 <input type="checkbox"/> (B) Standard deduction <input type="checkbox"/> (A) Itemized deduction	# _____
Paid any of these expenses in 2025?	(To be completed by certified volunteer) Expenses to report	Notes/Comments
<input type="checkbox"/> (B) Student loan interest <input type="checkbox"/> (B) Child and dependent care <input type="checkbox"/> (B/A) Contributions to a retirement account <input type="checkbox"/> (B) School supplies by a teacher, teacher's aide or other educator <input type="checkbox"/> (B) Alimony payments (do not include child support)	<input type="checkbox"/> (B) 1098-E <input type="checkbox"/> (B) Child and dependent care credit <input type="checkbox"/> (B/A) IRA (Basic if a Roth IRA or 401K) <input type="checkbox"/> (B) Educator expenses deduction <input type="checkbox"/> (B) Alimony payments with spouse's SSN Adjustment to income	\$ _____ <input type="checkbox"/> Yes <input type="checkbox"/> No
Did any of the following happen during 2025?	(To be completed by certified volunteer) Information to report	Notes/Comments
<input type="checkbox"/> (B) You or someone in your family took educational classes (technical school, college, job related, etc.)	<input type="checkbox"/> (B) Taxable scholarship income <input type="checkbox"/> (B) 1098-T (itemized statement from school, invoice, etc.) <input type="checkbox"/> (B) Education credit or tuition and fees deduction	
<input type="checkbox"/> (A) Sell a home	<input type="checkbox"/> (A) Sale of home (1099-S)	
<input type="checkbox"/> (A) Have a health savings account (HSA)	<input type="checkbox"/> (A) HSA contributions <input type="checkbox"/> (A) HSA distributions	
<input type="checkbox"/> (A) Purchase health insurance through the Marketplace (Exchange)	<input type="checkbox"/> (A) 1095-A	
<input type="checkbox"/> (A) Purchase and install energy-efficient home items (example: windows, furnace, insulation, etc.)	<input type="checkbox"/> (A) Energy efficient home improvement credit (Form 5695, Part II only)	
<input type="checkbox"/> (A) Other (example: purchased a new vehicle, etc.)	<input type="checkbox"/> VIN #	
<input type="checkbox"/> (A) Have credit card, mortgage, or other debt cancelled/forgiven by a lender	<input type="checkbox"/> (A) 1099-C	
<input type="checkbox"/> (A) Have a loss related to a declared Federal disaster area	<input type="checkbox"/> (A) 1099-A <input type="checkbox"/> Disaster relief impacts return	
<input type="checkbox"/> (B) Have a tax credit disallowed (example: earned income credit, child tax credit, or American opportunity credit)	<input type="checkbox"/> (B) EITC, CTC, AOTC or HOH disallowed in a previous year Year disallowed Reason	
<input type="checkbox"/> Receive any letter or bill from the IRS	<input type="checkbox"/> Eligible for Low Income Taxpayer Clinic referral	
<input type="checkbox"/> (B) Make estimated tax payments or apply last year's refund to 2025 taxes	<input type="checkbox"/> (B) Estimated tax payments <input type="checkbox"/> (B) Last year's refund applied to this year	
<input type="checkbox"/> Brought last year's return	<input type="checkbox"/> Last year's return available	

Optional Information

The following information is for statistical purposes only. Your responses to these questions are not a part of your tax return and are not transmitted to the IRS with your tax return. You are not required to answer these questions.

1. Would you say you can carry on a conversation in English	<input type="checkbox"/> Very well	<input type="checkbox"/> Well	<input type="checkbox"/> Not well	<input type="checkbox"/> Not at all	<input type="checkbox"/> Prefer not to answer
2. Would you say you can read a newspaper in English	<input type="checkbox"/> Very well	<input type="checkbox"/> Well	<input type="checkbox"/> Not well	<input type="checkbox"/> Not at all	<input type="checkbox"/> Prefer not to answer
3. Do you or any member of your household have a disability	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Prefer not to answer		
4. Are you or your spouse a Veteran of the U.S. Armed Forces	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Prefer not to answer		
5. What is your race and/or ethnicity? <u>Select all that apply</u>	<input type="checkbox"/> American Indian or Alaska Native (for example, Navajo Nation, Blackfeet Tribe of the Blackfeet Indian Reservation of Montana, Native Village of Barrow Inupiat Traditional Government, Nome Eskimo Community, Aztec, Maya, etc.) <input type="checkbox"/> Asian (for example, Chinese, Asian Indian, Filipino, Vietnamese, Korean, Japanese, etc.) <input type="checkbox"/> Black or African American (for example, African American, Jamaican, Haitian, Nigerian, Ethiopian, Somali, etc.) <input type="checkbox"/> Hispanic or Latino (for example, Mexican, Puerto Rican, Salvadoran, Cuban, Dominican, Guatemalan, etc.) <input type="checkbox"/> Middle Eastern or North African (for example, Lebanese, Iranian, Egyptian, Syrian, Iraqi, Israeli, etc.) <input type="checkbox"/> Native Hawaiian or Pacific Islander (for example, Native Hawaiian, Samoan, Chamorro, Tongan, Fijian, Marshallese, etc.) <input type="checkbox"/> White (for example, English, German, Irish, Italian, Polish, Scottish, etc.)				
6. What is your spouse's race and/or ethnicity? <u>Select all that apply</u>	<input type="checkbox"/> American Indian or Alaska Native (for example, Navajo Nation, Blackfeet Tribe of the Blackfeet Indian Reservation of Montana, Native Village of Barrow Inupiat Traditional Government, Nome Eskimo Community, Aztec, Maya, etc.) <input type="checkbox"/> Asian (for example, Chinese, Asian Indian, Filipino, Vietnamese, Korean, Japanese, etc.) <input type="checkbox"/> Black or African American (for example, African American, Jamaican, Haitian, Nigerian, Ethiopian, Somali, etc.) <input type="checkbox"/> Hispanic or Latino (for example, Mexican, Puerto Rican, Salvadoran, Cuban, Dominican, Guatemalan, etc.) <input type="checkbox"/> Middle Eastern or North African (for example, Lebanese, Iranian, Egyptian, Syrian, Iraqi, Israeli, etc.) <input type="checkbox"/> Native Hawaiian or Pacific Islander (for example, Native Hawaiian, Samoan, Chamorro, Tongan, Fijian, Marshallese, etc.) <input type="checkbox"/> White (for example, English, German, Irish, Italian, Polish, Scottish, etc.)				

Privacy Act and Paperwork Reduction Act Notice

We are asking for this information so you may participate in the IRS Volunteer Income Tax Assistance (VITA) and Tax Counseling for the Elderly (TCE) program which provides IRS-certified volunteer income tax preparers to assist with basic income tax return preparation for qualified individuals. The IRS authority to collect this information is 5 U.S.C. section 301 and 26 U.S.C. section 7801. The information you provide may be disclosed to others who coordinate VITA/TCE staffing, outreach, and other VITA/TCE related activities. The IRS may only disclose your return and return information as provided by 26 U.S.C. section 6103. All other records may be disclosed only for purposes the IRS deems are compatible with the purpose for which IRS collected the records, and consistent with any routine use disclosures described in the System of Record Notice (SORN) Treasury/IRS 24.030, Customer Account Data Engine (CADE) Individual Master File (IMF). You may view Treasury/IRS SORNs on the Treasury SORN website at Treasury.gov/System of Records Notices (SORNs). Providing this information is voluntary however, if you do not provide the requested information the IRS volunteers may not be able to assist you with preparing and filing your tax return.

The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests. The OMB Control Number for this study is 1545-1964. Also, if you have any comments regarding the time estimates associated with this study or suggestion on making this process simpler, write to the Internal Revenue Service, Tax Products Coordinating Committee, SE:TS:CAR:MP:T:T:SP, 1111 Constitution Ave. NW, Washington, DC 20224.

Additional Notes/Comments

Optional Questions for AARP Foundation

1. How many people, including you, are part of your household? (Your household includes you and the number of other people financially supported by your annual household income.) (select one)

1 (yourself) 2 3 4 or more Prefer not to answer

2. Do you rent or own your home?

Rent Own Neither Prefer not to answer

Opportunity to Save Your Refund

Whether you want to save for an upcoming purchase, unexpected expenses, or things that are important to you, tax time provides a key opportunity to plan for your future financial security.

If you wish to start or continue saving your tax refund this year, let your Tax-Aide Counselor know.

How to Use this Intake Booklet

Welcome to our AARP Foundation Tax-Aide site. This Intake Booklet is one of the primary ways for you to provide information to the volunteer who will prepare your tax return. In addition to any paperwork you brought, this information will help give us a more complete picture of your tax situation and will also allow you to give us permission to take certain actions. Please complete the Booklet in its entirety and take a look at the following information to help you decide if you wish to give your consents and answer certain questions. **Your answers will not affect the preparation of your tax return.**

Demographic Questions: These are questions about you (and your spouse, if filing jointly). The data from these questions are used to meet grant requirements and for statistical and program planning purposes.

Consent to Disclose Tax Return Information to VITA/TCE Tax Preparation Sites. If you had your tax return prepared at this site last year, some of your information (name, address, dependents, payers, etc.) will automatically appear when we prepare your return this time. You can also conveniently have your information available at any other AARP Foundation Tax-Aide or VITA Site. Sign this form if you want your information to be available at any AARP Foundation Tax-Aide or VITA Site you decide to use next year.

Consent to Disclose/Use Information to AARP Foundation. Sign this form if you want to allow information from your tax return, including answers to demographic questions, to be provided by Tax-Aide to the program sponsor – AARP Foundation – to assist in program development and to send you other AARP Foundation program information.

Consent for AARP Foundation to Use Select Tax Return Information. Consent for AARP Foundation to use select tax return information to provide you with additional information about other free AARP Foundation programs or services. In addition to AARP Foundation Tax-Aide, AARP Foundation helps older adults with low income secure the essentials, including relevant benefits, good jobs, and refunds, and to sustain social connections through a variety of programs and services. Some or all of these programs or services may be relevant to you. Sign this form if you agree to allow AARP Foundation—the charitable affiliate of AARP—to send you information about free programs and services. Your data will not be shared with AARP or AARP's licensed service providers for the purposes of membership marketing or paid offers.

Consent to Disclose Tax Return Information to VITA/TCE Tax Preparation Sites

Federal Disclosure:

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot disclose your tax return information to third parties for purposes other than the preparation and filing of your tax return without your consent. If you consent to the disclosure of your tax return information, Federal law may not protect your tax return information from further use or distribution.

You are not required to complete this form to engage our tax return preparation services. If we obtain your signature on this form by conditioning our tax return preparation services on your consent, your consent will not be valid. If you agree to the disclosure of your tax return information, your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year from the date of signature.

Terms:

Global Carry Forward of data allows TaxSlayer LLC, the provider of the VITA/TCE tax software, to make your tax return information available to ANY volunteer site participating in the IRS's VITA/TCE program that you select to prepare a tax return in the next filing season. This means you will be able to visit any volunteer site using TaxSlayer next year and have your tax return populate with your current year data, regardless of where you filed your tax return this year. This consent is valid through November 30, 2027.

The tax return information that will be disclosed includes, but is not limited to, demographic, financial and other personally identifiable information, about you, your tax return and your sources of income, which was input into the tax preparation software for the purpose of preparing your tax return. This information includes your name, address, date of birth, phone number, SSN, filing status, occupation, employer's name and address, and the amounts and sources of income, deductions and credits that were claimed on, or contained within, your tax return. The tax return information that will be disclosed also includes the name, SSN, date of birth, and relationship of any dependents that were claimed on your tax return.

You do not need to provide consent for the VITA/TCE partner preparing your tax return this year. Global Carry Forward will assist you only if you visit a different VITA or TCE partner next year that uses TaxSlayer. You have the right to receive a signed copy of this form.

Limitation on the Duration of Consent: I/we, the taxpayer, do not wish to limit the duration of the consent of the disclosure of tax return information to a date earlier than presented above (November 30, 2027). If I/we wish to limit the duration of the consent of the disclosure to an earlier date, I/we will deny consent.

Limitation on the Scope of Disclosure: I/we, the taxpayer, do not wish to limit the scope of the disclosure of tax return information further than presented above. If I/we wish to limit the scope of the disclosure of tax return information further than presented above, I/we will deny consent.

Consent:

I/we, the taxpayer, have read the above information.

I/we hereby consent to the disclosure of tax return information described in the Global Carry Forward terms above and allow the tax return preparer to enter a PIN in the tax preparation software on my behalf to verify that I/we consent to the terms of this disclosure.

Primary taxpayer printed name and signature	Date
Secondary taxpayer printed name and signature	Date

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484. Report a Crime or IRS Employee Misconduct - U.S. Treasury Inspector General for Tax Administration (TIGTA) (<https://www.tigta.gov/reportcrime-misconduct>).

Consent to Disclose/Use Information to AARP Foundation

Federal Disclosure

Federal law requires this consent form be provided to you ("you" refers to each taxpayer, if more than one). Unless authorized by law, we cannot disclose, without your consent, your tax return information to third parties for purposes other than the preparation and filing of your tax return. If you consent to the disclosure of your tax return information, Federal law may not protect your tax return information from further use or distribution.

You are not required to complete this form to engage our tax return preparation services. If we obtain your signature on this form by conditioning our tax return preparation services on your consent, your consent will not be valid. If you agree to the disclosure of your tax return information, your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year from the date of signature.

Terms:

I/We authorize the AARP Foundation as follows:

3 Years-Disclosure: Tax Preparer will disclose the Personal Information to the Software Developer through Software Developer's tax preparation program. The Software Developer will disclose the Personal Information to AARP Foundation.

3 Years-Purpose of the Disclosure/Use is for the Software Developer to make available the Taxpayer's Personal Information as entered in the tax return to AARP Foundation in order for it to provide reporting, support, administrative assistance, and program and research opportunities to the tax preparer.

Personal Information: The tax return information that will be disclosed includes—but is not limited to—demographic, financial and other personally identifiable information, about you, your tax return, your sources of income, and any other data that was input into the tax preparation software.

Limitation on the Duration of Consent: I/we, the taxpayer, do not wish to limit the duration of the consent of the disclosure/use of tax return information to a date earlier than three years. If I/we wish to limit the duration of the disclosure/use to an earlier date, I will deny consent.

Limitation on the Scope of Disclosure: I/we, the taxpayer, do not wish to limit the scope of the disclosure of tax return information further than presented above. If I/we wish to limit the scope of the disclosure of tax return information further than presented above, I/we will deny consent.

Primary taxpayer printed name and signature	Date
Secondary taxpayer printed name and signature	Date

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by email at complaints@tigta.treas.gov.

Consent for AARP Foundation to Use Select Tax Return Information

Federal Disclosure

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot use your tax return information for purposes other than the preparation and filing of your tax return without your consent.

You are not required to complete this form to engage our tax return preparation services. If we obtain your signature on this form by conditioning our tax return preparation services on your consent, your consent will not be valid. Your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year from the date of signature.

Terms:

The AARP Foundation Tax-Aide program is one of several free programs or services that AARP Foundation provides to help older adults with low income secure the essentials, including good jobs, eligible benefits, refunds, and sustaining social connections. Some of these programs or services may be relevant to you. If you would like us to use your tax return information to help determine whether other free AARP Foundation programs or services might be available to you, to send you details about how to access these programs or services, and/or contact you to see if you are eligible and interested to participate in research-related activities, such as surveys or discussion groups, that inform our programs and services, please sign and date this consent for the use of your tax return information.

I/We authorize AARP Foundation as follows:

3 Years-Purpose: The purpose of the Use is for AARP Foundation to use your tax return information to determine whether to provide you additional information about other free AARP Foundation programs or services.

Personal Information: The tax return information that will be disclosed includes — but is not limited to —demographic, financial and other personally identifiable information, about you, your tax return, your sources of income, and any other data that was input into the tax preparation software.

Limitation on the Duration of Consent: I/we, the taxpayer, do not wish to limit the duration of the consent of the use of tax return information to a date earlier than three years. If I/we wish to limit the duration of the use to an earlier date, I/we will deny consent.

Primary taxpayer printed name and signature	Date
Secondary taxpayer printed name and signature	Date

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by email at complaints@tigta.treas.gov.