AARP Tax-Aide Foundation

CLARK AND SKAMANIA COUNTIES

FREE TAX HELP

The AARP Tax-Aide program, administered by the AARP Foundation in cooperation with the IRS, provides free income tax assistance to low- and moderate-income taxpayers, with special attention to those age 60 or older.

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; however, they CANNOT PREPARE returns for Married Filing Separately (MFS), Registered Domestic Partners (RDP), Schedule C with expenses over $25,000, losses, or with employees; or returns requiring Forms 2106, 3903, 8606 and 8615. Volunteers are trained to assist you with ACA, HSA, and EITC issues on your tax return. If you have questions about what can and cannot be done, visit one of our sites for advice. Tax returns are electronically filed as a free service by Tax-Aide.

Photo ID is required for the taxpayer(s) present and you **MUST** bring acceptable proof of social security number (SSN) or individual taxpayer identification number (ITIN) for every person on your tax return.

Acceptable proof is either:

- original or copies of SS cards
- a social security statement (SSA-1099), railroad retirement (RRB-1099), Federal Civil Service Retirement (CSA-1099R or CSF-1099R)
- Medicare cards with the letter 'A'
- original ITIN or ATIN card PREFERRED or may bring letter from IRS

A list of what to bring is printed on the back of this sheet.

Print tax forms 24/7 at www.irs.gov.
Visit your local library during open hours for assistance in getting printed forms.

Taxpayers with complex tax returns will be advised to seek professional tax assistance.
If you are interested in being a Tax-Aide volunteer next year, please contact the AARP at 1-888-AARP-NOW (1-888-227-7669) or via the AARP Tax-Aide website at www.aarp.org/taxaide or the local website for Clark County at www.aarp-tax-aide-SW-Washington.org

FREE ASSISTANCE is available at the following locations January 30 through April 18:

Sites will **close** at the hours shown. Tax returns will be started **only** if time permits **completion before closing.**

Call 360-690-4496 x105 for appointments at one of these locations:
- Battle Ground Community Library
- Community Housing Resource Center
- Three Creeks Community Library

Battle Ground Community Library
1207 SE 8th Way in Battle Ground Village
Wednesdays 3 pm to 7 pm
Fridays 1 pm to 5 pm

Camas Public Library
625 NE 4th Ave, Camas
Thursdays 11 am to 3 pm *(starting 2/11)*
Saturdays 11 am to 3 pm *(starting 2/13)*

Cascade Park Community Library
600 NE 136th Ave, Vancouver
Tuesdays and Wednesdays 11:30 am to 3:30 pm

Community Housing Resource Center (CHRC)
103 E 29th Street, Vancouver
Mondays & Wednesdays 11 am to 3 pm
Saturdays 11 am to 3 pm *(1/30, 2/13, 2/27, 3/12, 3/26, 4/9)*

Marshall Community Center
1009 E McLoughlin Blvd, Vancouver
Tuesdays & Fridays 12 pm to 4 pm

North Bonneville Community Library
214 CBD Mall, North Bonneville
Wednesdays 11 am to 3 pm *(2/17, 3/16)*

Port of Woodland
115 Davidson Ave, Woodland
Mondays 9:30 am to 1:30 pm *(2/8, 2/15, 3/14, 3/21, 4/11, 4/18)*

Stevenson Community Library
Call the library directly for an appointment, 509-427-5471
120 NW Vancouver Avenue, Stevenson
Fridays 11 am to 3 pm *(2/12, 3/11, 4/8)*
Saturdays 11 am to 3 pm *(1/30, 2/27, 3/26)*

Three Creeks Community Library
800-C NE Tenney Rd, Vancouver
Tuesdays & Wednesdays 1 pm to 5 pm
Thursdays 3 pm to 7 pm

Vancouver Community Library
901 C Street, Vancouver
Mondays 10 am to 6 pm *(not available 2/15)*
Wednesdays 2 pm to 6 pm
Saturdays 11 am to 4 pm *(not available 1/30)*
Spanish interpreter will be available most days.

Reminder:
2-hour limit on free parking at this location weekdays before 6 pm

AARP TAX AIDE 2015 TAX RETURN

(District 1, SW Washington Clark County including Stevenson)

What do I need to bring?

- Government-issued photo identification for the taxpayer and the spouse, if present at the time of the appointment.

- Social Security identification card, Medicare card with "A", SSA 1099, RRB 1099 R, CSA 1099 AR or CSF 1099R.
  - This is needed for the taxpayer <u>and</u> each person that will be listed on the tax return, e.g. spouse, children, parent, or other relative that may be listed as a dependent. If applicable, provide the letter or card for ITIN or ATIN.

- It is **highly recommended** that you have the prior year tax return with all attachments and schedules. (The current tax year booklets are NOT required)

- All income documents for 2015 including W-2s, interest and dividend statements (1099-INT and 1099-DIV), Social Security statements (SSA-1099), Retirement income (1099-R, RRB-1099, etc.), and other income such as self-employed business income (1099-MISC), jury duty pay, prior year state tax refunds, unemployment income (1099-G), and gambling income. (Note: Records of gambling losses should also be provided if there is gambling income.) **Not:** monthly wage statements, estimated earnings, check statements showing automatic deposits.

- Documentation of investment income such as 1099-B and/or combined brokerage statements. Documentation of the date and price of acquisition and sale of capital assets such as stocks, bonds is required.

- To claim dependent or child care, provide the caregiver's name, address, payments, and the Employer Identification Number (EIN) or Social Security Number (SSN).

- 1098T to claim an education expense.

- 1095A, 1095B, or 1095C – Health care coverage tax forms, if applicable. If you purchased health care coverage on the Marketplace, you **must** bring Form 1095A. Health insurance cards are helpful, but not required.

- 1099SA – Distributions from an HSA (and any other related documents).

- 1098 for mortgages showing interest and real property taxes. (If property taxes are not listed on the 1098, bring other proof of taxes paid.)

- Itemized statement for each category of expenses to be claimed, such as:
  - Prescriptions, medical copays, medical insurance, sales taxes paid, amount of cash or the value of goods donated (date and organization), miles driven for medical purposes, miles driven for charitable organizations, employee expenses.

- Voided check showing routing number and account number for automatic deposits or withdrawals. (Alternative: letter from the financial institution with the account information)

- Hint: check last year's return to see if there are other categories of income, expense, or credits that you may be able to claim in 2015. If so, bring the documentation.