AARP Foundation
TAX-AIDE
Free tax assistance for those who need it most

What to Bring for Your Free AARP Tax Preparation (2023)

IDENTIFICATION

- **Government issued photo ID** for taxpayer (and spouse if joint return)
- **Social Security cards** for taxpayer, spouse and dependents (or SSN verification letter from Social Security Administration; or Individual Tax Identification Number ("ITIN") letter; or proof of foreign status if applying for ITIN)

PLEASE NOTE

AARP Tax-Aide volunteers **cannot prepare** returns that include rental property, military income, alternative minimum tax, many stock transactions or in other situations where volunteers have not been trained. We cannot prepare your return if you were not a full time resident of New York State for the entire year.

DOCUMENTS

The **COMPLETED** 8-page *Intake/Interview & Quality Review Sheet.*

A copy of last year's federal and state returns. If you do not bring your last returns, we will not know if you have given us all of the information for items of income, deductions and credits and carryovers of capital losses, contributions, credits and other items. The risk is that something will not be included on your 2023 return. .

Any notices you received from the IRS or NYS Taxation, including any notice of return changes or identity fraud.

INCOME (As Applicable)

- Wage and other earning statements (Form W-2, W-2G, 1099-R, 1099-Misc. etc.) from all sources.
- Form 1099-G if you collected unemployment benefits. Also need 1099-G if you had a state income tax refund AND itemized deductions last year. You may need to go online to obtain these.
- Form SSA-1099 Social Security Benefit Statement.
- Interest and dividend statements from banks and brokerage firms (Form 1099 int or div) and any other year end brokerage tax statements. Your bank may not issue this to you if your interest or dividend is under $10 but you are still required to report any interest received. Brokerage firms are not required to send you these forms until the end of February.
- Form W-2G if you had gambling winnings / losses. Please note, if taxes were withheld OUTSIDE OF NY STATE we won't be able to complete the forms required to have the amount refunded or credited.

SELF EMPLOYMENT

If you are self-employed bring an itemized list of self-employment income and related expenses along with any 1099-NEC, 1099-MISC or 1099-K statements you received.

DEDUCTIONS / CREDITS (As Applicable)

Child / Dependent Care: Even if you're not itemizing, you may qualify for a credit. Please provide Total paid for daycare provider and the daycare provider's name, address, and tax identifying number such as their Social Security number or business Employer Identification Number.

Itemized Deductions: You may be able to save on income taxes if you have substantial real estate taxes, unreimbursed medical expenses, gambling losses, or other deductible items. You must provide documentation for Itemized Deductions if you want us to see if Itemizing is better for you than the Standard Deduction. The Federal Standard Deduction ranges from $13,850 for singles and up to $30,700 for a married couple both over 65. The corresponding figures for NY State are about $8,000 and $16,050; **you can take the Standard Deduction for Federal and itemize for NY.** The IRS caps State and Local Taxes at $10,000. NY does not have any cap. If you want to itemize you MUST complete the ***2023 Itemized Deduction Worksheet,*** page 3. We cannot accept bunches of receipts or a number from an earlier tax return as an estimate.

Education Expenses / Student Loan Interest: Please bring the tax statements you received, since you may qualify for a credit even if you're not itemizing.

DIRECT DEPOSIT OR PAYMENT

A blank check if you want your refund to be direct deposited or payment to be automatically withdrawn from your account. Volunteer tax preparers will not keep this check nor any of your other papers.

SIGNING YOUR RETURN

For a married-filing-joint tax return, **both spouses must be present to sign the required forms.**

2023 Itemized Deductions (Sch A) Worksheet

__I donated a vehicle worth more than $500 __I made more than $5,000 of noncash donations
__I paid interest on borrowings for investments __ I repaid income (taxed in prior year) over $3,000

If you checked any of the above, please stop here and speak with one of our Counselors.

If none is checked: enter your totals below for each expense – we do not need the details. Please ask if you are unsure or have any questions.

Your name: ______________________________

MEDICAL EXPENSES you paid for yourself or your dependent that were not reimbursed	
Insurance* (specify)	$
	$
	$
Long Term Care Insurance	$
*Not paid pre-tax from paycheck for health, dental, vision, long-term care. Provide Form 1095-A from Marketplace if received.	
Doctors, dentist, etc.	$
Hospital, medically needed care facility, etc.	$
Prescriptions (even if filled with over the counter meds)	$
Medical aids (canes, glasses, etc.)	$
COVID protective items	$
Other (specify):	$
	$
Parking	$
Bus or car service	$
Medical miles Jan - Jun	mi.
Medical miles Jul - Dec	mi.
CHARITY (you need to keep evidence of each; if $250 or more, must be in writing from charity)	
Cash contributions (total)	$
Other than cash, specify name of charity (provide thrift store value) (no appreciated items)	$
	$
	$
Charitable miles	mi.

STATE/LOCAL TAXES	
State/local income tax paid (other than through withholding)	$
Sales tax on car or home improvement purchases	$
Real estate taxes (not service fees like garbage or sewer)	$
	$
Other taxes paid (specify):	$
	$
INTEREST	
Home mortgage interest - on main home	$
- on second loan or home	$
Loan balance owed at Jan 1 or date acquired (Form 1098):	$
Amount of loan used to buy, build, or improve home, if less than the full amount	$
Mortgage insurance required by lender Year loan originated	$ Yr:
Other (specify):	$
OTHER:	
Gambling losses/expenses	$
Other (specify):	$

We'll use your 2023 federal standard deduction shown below if more than your itemized deductions above (if blind, add $1,750 or $1,400 if married):

Single	$13,850	Married (filing jointly)	$27,700	HOH	$20,800
Single (65+)	$15,700	Married (one 65+)	$29,200	HOH (65+)	$22,650
		Married (both 65+)	$30,700		

National Tax Training Committee November 26, 2023