AARP Tax Assistance at the Downers Grove Park District
December 12, 2023

AARP Income Tax assistance is a free service provided by the AARP Foundation with IRS-certified volunteers in partnership with the Downers Grove Park District. There is no age requirement to use this service and you do not need to be an AARP member.

Appointments are available on a first-come, first-served basis Tuesdays and Thursdays, February 6 – April 11, 2024 from 9:00 AM – 12:30 PM. The Park District will begin scheduling appointments beginning on January 8, 2024 until all appointments are full. Once all timeslots are full, the Park District will not accept any more appointments.

YOU MUST HAVE AN APPOINTMENT IN ORDER TO HAVE YOUR TAX RETURN PREPARED – NO-WALK-INS

Location: Downers Grove Park District Lincoln Center, 935 Maple Avenue, Downers Grove, IL 60515, Room 503. The Lincoln Center is approximately ½ block east of Main Street - on Maple Avenue. The building is an old red brick school building and it is located on the south side of the street. The entrance to the parking lot is just past the red brick building and we share an entrance with the white church on the corner. If you have gone to the corner – you have passed the building.

How to schedule an appointment:

By Phone: Call 630-960-7500 to speak to a Downers Grove Park District Customer Service Assistant

In-person: Lincoln Center: 935 Maple Avenue / Mon. – Fri.: 9:00am – 4:00pm
Recreation Center: 4500 Belmont Rd / Mon. – Fri.: 9:00am – 4:00pm

After you have made your appointment, you can stop by the Lincoln Center to pick up the instructions and forms you will need to read and complete before your appointment. You will find those forms on a table right by the Registration desk in the Lincoln Center. You can also have the instructions and forms emailed to you. Just ask the Customer Service Assistant to email you the Tax Aide forms. Please pick up your forms and complete them to the best of your ability before your appointment.

Here are some instructions to follow and documents to bring with you to your appointment:

- Everyone listed on the tax return MUST HAVE A SOCIAL SECURITY CARD or SOCIAL SECURITY STATEMENT
- Photo I.D. for all signers of the return is mandatory
- Social Security (SSA – 1099) or Railroad Retirement (RRB – 1099) benefits
- 1099-R form for pensions, 401(k), & IRA

For any questions regarding your tax appointment please contact Downers Grove AARP Tax Aides by phone or email: • Phone number: 331-481-9875 • Email address: aarpgd@yahoo.com
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- W-2 forms (wages and gambling winnings)
- 1099 forms - interest, dividend, unemployment and broker statements
- Know purchase date & what you paid for any stocks, bonds or mutual funds sold for any transactions not listed on your broker statements
- Simple K-1 forms (trust income)
- Info. documenting your deductions: medical, real estate taxes, mortgage interest paid (1098)
- Real Estate tax bill (property index number) is mandatory for property owners
- Receipts showing cash or material donations to charitable organizations
- College tuition expenses (1098 – T)
- Your record of estimated tax payments, federal and state
- Records of income & expenses, if self-employed
- Last year’s tax returns (both state and federal)
- A voided check or checkbook showing account routing number so that refunds can be directly deposited, or taxes paid electronically

PLEASE READ THE FOLLOWING PAGES WHICH SHOWS THE ITEMS WHICH WOULD PREVENT US FROM COMPLETING A RETURN FOR YOU.

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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.
- Most income reported on Form 1099-MISC or Form 1099-NEC or form 1099-K.
- Schedule K-1 that includes only interest, dividends, capital gains/losses or royalties.
- Charitable cash contributions.
- Qualified Business Income deduction.
- 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.
- Repayment of first-time homebuyer credit.
- Estimated tax payments.
- Injured spouse allocation, depending on state.
- Health Savings Accounts (HSA).
- Amendments to filed returns.
- Prior three tax years’ returns.

**We can’t prepare returns with:**

- Self-employment if there are employees, losses, expenses that exceed $35,000, 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.
- Moving expenses.*
- Some investment income or itemized deductions that are not included in our training.
- Foreign financial asset reporting requirements.
- Any virtual currency investment or transaction.

**Rental or moving:** A volunteer can prepare returns for active duty military personnel only when the preparing volunteer is certified in the military module and another volunteer is certified to review military returns.

*A:AARP Foundation Tax-Aide is offered in conjunction with the IRS.*
Taxpayer Information and Responsibilities

Welcome to AARP Foundation Tax-Aide. Our IRS-certified volunteers will assist you shortly. In the meantime, please take a moment to read the following information.

Taxpayers will:
- Provide all required information and documents to ensure the completion of your return
- Sign-in at the tax site and follow the guidance of the volunteer
- Complete the Intake Booklet fully and accurately
- Participate in the intake interview, tax preparation and quality review process
- Inform the volunteer of all income including cash, gambling winnings, etc.
- Understand that some returns are beyond the program scope (see scope poster) or have complicated state or other issues. If your return falls outside the program scope, you must either prepare your own return or engage a professional preparer.
- Ensure the return is complete and accurate before signing. Joint returns require the signature of both spouses.
- Agree that you are responsible for the accuracy of the return
- Treat volunteers with courtesy and respect
- Questions? Call 888-687-2277 or email taxaide@aarp.org

Tax-Aide volunteers will:
- Treat taxpayers in a courteous and professional manner
- Prepare tax returns within the scope of the program
- Provide tax assistance based on the information and documents provided by the taxpayer
- Quality review all tax returns
- Respect taxpayers’ privacy and confidentiality

Essential Documents to Have at the Tax Site
- Government-issued photo ID for the taxpayer(s) on the return
- Social Security cards or ITIN documentation for all
- Copy of 2021 tax return
- Brokerage statements – sale of stocks or bonds
- Healthcare – Forms 1095-A if have marketplace insurance
- Mortgage interest, medical/dental expenses, charitable donations, sales, income or property taxes
- Records of federal and state income taxes paid
- Educational expenses – Form 1098-T, student’s detailed financial school account; other education expenses
- Checking or savings account info for direct deposit of refund or direct debit of balance due
- Any other recent IRS or state tax department correspondence

Tax-Aide Process

Waiting Area
- Sign-In
- Complete Intake Booklet
- Organize Your IDs, SS Cards and Tax Documents

Tax Preparation
- IDs, SS Cards Checked
- Intake Booklet and Tax Documents Reviewed
- Taxpayer Interviewed
- Tax Return Prepared

Quality Review
- IDs, SS Cards Checked
- Intake Booklet and Tax Documents Reviewed
- Taxpayer Interviewed
- Tax Return Reviewed
- Return Signed
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.
• Please complete pages 1-4 of this form.

Part I – Your Personal Information

1. Your first name
   M.I.
   Last name

2. Your spouse's first name
   M.I.
   Last name

3. Mailing address
   APT #
   City
   State
   ZIP code

4. Your Date of Birth

5. Your job title

6. Last year, were you:
   a. Full-time student
   Yes
   No
   b. Totally and permanently disabled
   Yes
   No
   c. Legally blind
   Yes
   No

7. Your spouse's Date of Birth

8. Your spouse's job title

9. Last year, was your spouse:
   a. Full-time student
   Yes
   No
   b. Totally and permanently disabled
   Yes
   No
   c. Legally blind
   Yes
   No

10. Can anyone claim you or your spouse as a dependent?
   Yes
   No
   Unsure

11. Have you, your spouse, or dependents been a victim of tax related identity theft or been issued an Identity Protection PIN?
   Yes
   No

12. Provide an email address (optional) (this email address will not be used for contacts from the Internal Revenue Service)

Part II – Marital Status and Household Information

1. As of December 31, 2023, what was your marital status?
   Never Married
   Married
   Divorced
   Widowed
   Legally Separated
   Date of separate maintenance decree
   Date of final decree
   Date of separate maintenance decree
   Date of separate maintenance decree
   Date of final decree
   Date of separate maintenance decree
   Date of final decree
   Date of separate maintenance decree
   Date of final decree
   Date of separate maintenance decree
   Date of final decree

2. List the names below of:
   • everyone who lived with you last year (other than your spouse)
   • anyone you supported but did not live with you last year (other than your spouse)

3. To be completed by a Certified Volunteer Preparer
   Name (first, last)
   (a) Date of birth (mm/dd/yy)
   (b) Relationship to you
   (c) Number of months lived in your home last year
   (d) US Citizen (yes/no)
   (e) Resident of US, Canada, or Mexico last year (yes/no)
   (f) Single or Married as of 12/31/23 (S/M)
   (g) Full-time Student last year (yes/no)
   (h) Totally and permanently disabled (yes/no)
   (i) Is this person a qualifying child/relative of any other person? (yes/no)
   (j) Did this person provide more than 50% of his/her own support? (yes, no, n/a)
   (k) Did this person have less than $4,700 of income? (yes, no, n/a)
   (l) Did the taxpayer(s) provide more than 50% of support for this person? (yes, no, n/a)
   (m) Did the taxpayer(s) pay more than half the cost of maintaining a home for this person? (yes, no)
**Part III – Income – Last Year, Did You (or Your Spouse) Receive**

<table>
<thead>
<tr>
<th>Number</th>
<th>Source</th>
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<tbody>
<tr>
<td>1.</td>
<td>(B) Wages or Salary? (Form W-2)</td>
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<td>2.</td>
<td>(A) Tip Income?</td>
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<td>3.</td>
<td>(B) Scholarships? (Forms W-2, 1098-T)</td>
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<td>4.</td>
<td>(B) Interest/Dividends from: checking/savings accounts, bonds, CDs, brokerage? (Forms 1099-INT, 1099-DIV)</td>
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<td>5.</td>
<td>(B) Refund of state/local income taxes? (Form 1099-G)</td>
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<tr>
<td>6.</td>
<td>(B) Alimony income or separate maintenance payments?</td>
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<tr>
<td>7.</td>
<td>(A) Self-Employment income? (Forms 1099-MISC, 1099-NEC, 1099-K, cash, digital assets, or other property or services)</td>
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<td>8.</td>
<td>(A) Cash/check/digital assets, or other property or services for any work performed not reported on Forms W-2 or 1099?</td>
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<td>9.</td>
<td>(B) Disability income? (such as payments from insurance, or workers compensation) (Forms 1099-R, W-2)</td>
</tr>
<tr>
<td>10.</td>
<td>(A) Retirement income or payments from pensions, annuities, and/or IRA? (Form 1099-R)</td>
</tr>
<tr>
<td>11.</td>
<td>(B) Unemployment Compensation? (Form 1099-G)</td>
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<tr>
<td>12.</td>
<td>(B) Social Security or Railroad Retirement Benefits? (Forms SSA-1099, RRB-1099)</td>
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<tr>
<td>13.</td>
<td>(B) Income (or loss) from rental property?</td>
</tr>
<tr>
<td>14.</td>
<td>(M) Income (or loss) from the sale of real estate, personal property, or other property (Forms SS-1099, RB-1099)</td>
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<tr>
<td>15.</td>
<td>(B) Other income? (gambling, lottery prizes, awards, jury duty, digital assets, stocks, bonds, royalties, foreign income, etc.)</td>
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</tbody>
</table>

**Part IV – Expenses – Last Year, Did You (or Your Spouse) Pay**

<table>
<thead>
<tr>
<th>Number</th>
<th>Source</th>
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</thead>
<tbody>
<tr>
<td>1.</td>
<td>(B) Alimony or separate maintenance payments? If yes, do you have the recipient's SSN?</td>
</tr>
<tr>
<td>2.</td>
<td>Contributions or repayments to a retirement account?</td>
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<tr>
<td>3.</td>
<td>(B) College or post-secondary educational expenses for yourself, spouse or dependents? (Form 1098-T)</td>
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<tr>
<td>4.</td>
<td>Any of the following?</td>
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<tr>
<td>5.</td>
<td>(B) Child or dependent care expenses such as daycare?</td>
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<td>6.</td>
<td>(B) For supplies used as an eligible educator such as a teacher, teacher's aide, counselor, etc.?</td>
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<td>7.</td>
<td>(A) Expenses related to self-employment income or any other income you received?</td>
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<tr>
<td>8.</td>
<td>(B) Other income? (gambling, lottery prizes, awards, jury duty, digital assets, stocks, bonds, royalties, foreign income, etc.)</td>
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**Part V – Life Events – Last Year, Did You (or Your Spouse) Experience**

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<tr>
<th>Number</th>
<th>Source</th>
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<tbody>
<tr>
<td>1.</td>
<td>(A) Have a Health Savings Account? (Forms 5498-SA, 1099-SA, W-2 with code W in box 12)</td>
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<tr>
<td>2.</td>
<td>(A) Have credit card, student loan or other debt cancelled/forgiven by a lender or have a home foreclosure? (Forms 923, 928-C)</td>
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<td>3.</td>
<td>(A) Adopt a child?</td>
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<td>4.</td>
<td>(B) Have Earned Income Credit, Child Tax Credit or American Opportunity Credit disallowed in a prior year? If yes, for which tax year?</td>
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<td>5.</td>
<td>(A) Purchase and install energy-efficient home items? (such as windows, furnace, insulation, etc.)</td>
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<td>6.</td>
<td>(A) Have health coverage through the Marketplace (Exchange)? Provide Form 1095-A.</td>
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<td>7.</td>
<td>(A) Have as an eligible educator such as a teacher, teacher's aide, counselor, etc.?</td>
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<tr>
<td>8.</td>
<td>(B) Have a Health Savings Account? (Forms 5498-SA, 1099-SA, W-2 with code W in box 12)</td>
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Check appropriate box for each question in each section.
<table>
<thead>
<tr>
<th>Question</th>
<th>Yes</th>
<th>No</th>
<th>Prefer not to answer</th>
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<tbody>
<tr>
<td>1. Would you like to receive written communications from the IRS in a language other than English?</td>
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<td>2. Presidential Election Campaign Fund (If you check a box, your tax or refund will not change)</td>
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<td>3. If you are due a refund, would you like:</td>
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<td>a. Direct deposit</td>
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<td>b. To purchase U.S. Savings Bonds</td>
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<td>c. To split your refund between different accounts</td>
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<td>4. If you have a balance due, would you like to make a payment directly from your bank account?</td>
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<td>5. Did you live in an area that was declared a Federal disaster area?</td>
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<td>6. Did you receive a letter from the IRS?</td>
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<td>7. Would you like information on how to vote and/or how to register to vote?</td>
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<td>8. Would you say you can carry on a conversation in English, both understanding &amp; speaking?</td>
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<td>9. Would you say you can read a newspaper or book in English?</td>
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<td>10. Do you or any member of your household have a disability?</td>
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<td>11. Are you or your spouse a Veteran from the U.S. Armed Forces?</td>
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<td>12. Your race?</td>
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Optional Questions for AARP Foundation

16. 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

17. Do you have a permanent disability or chronic condition that hinders or limits the amount of or kind of activities that you do?

☐ Yes
☐ No
☐ Prefer not to answer

18. Does your spouse have a permanent disability or chronic condition that hinders or limits the amount of or kind of activities that he/she does?

☐ Yes
☐ No
☐ Prefer not to answer

19. Did you save part of your refund last year?

☐ No refund last year
☐ Yes
☐ No
☐ Don't remember
☐ Prefer not to answer

20. Do you rent or own your home?

☐ Rent
☐ Own
☐ Neither
☐ Rent or own
☐ Prefer not to answer

21. What is your gender identity? (select all that apply)

☐ Male
☐ Female
☐ Non-Binary
☐ Prefer to self-describe
☐ Prefer not to answer

22. What is your spouse’s gender identity? (select all that apply)

☐ Male
☐ Female
☐ Non-Binary
☐ Prefer to self-describe
☐ Prefer not to answer

23. Do you identify as LGBTQ+ (Lesbian, Gay, Bisexual, Transgender, Queer/Questioning, ...)?

☐ Yes
☐ No
☐ Prefer not to answer

24. Does your spouse identify as LGBTQ+ (Lesbian, Gay, Bisexual, Transgender, Queer/Questioning, ...)?

☐ Yes
☐ No
☐ 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.

In past seasons Tax-Aide users have either deposited some of their refund into a savings account or purchased a $50 savings bond. 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 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, to help support the funding of this free service and to send you other AARP Foundation program 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 good jobs, eligible benefits, crucial refunds, and sustaining 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 want 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, 2025.

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, 2025). 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).
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 used includes your name, address, email, phone number, age, adjusted gross income, race, ethnicity, gender identity, sexual orientation, disability status, veteran status, household size, refund allocations, credits, property ownership, and schedules used.

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.