

AARP Tax Assistance at the Downers Grove Park District

Revised December 21, 2021

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-serve basis Tuesdays and Thursdays, February 15 – April 7, 2022 from 9:30 AM – 1:00 PM.

The Park District will begin scheduling appointments beginning on January 10, 2022 until all appointments are full. Once all timeslots are full, we will not accept any more appointments. **YOU MUST HAVE AN APPOINTMENT IN ORDER TO HAVE YOUR TAX RETURN PREPARED – NO-WALK-INS**

Appointment location:

- 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:

- Appointments can be made Monday – Friday from 9:00am – 4:00pm
- By Phone: 630-960-7500
- In-person: Lincoln Center: 935 Maple Avenue or Recreation Center: 4500 Belmont Road

Forms:

- 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.
- The forms will be available in the lobby of Lincoln Center.
- If you prefer, the instructions and forms can also be emailed to you, but you will need access to a printer if the forms are emailed to you.
- All forms need to be completed to the best of your ability prior to your appointment.

Instructions and documents to bring for your appointment:

- Everyone listed on the tax return **MUST HAVE** a SOCIAL SECURITY CARD! Medicare cards will not be accepted.
- 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
- W-2 forms (wages and gambling winnings)

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- 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 statement
- 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, even if you do not itemize
- 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)
- Last year's AARP Tax Return envelope, if you had us complete a return for you for 2020
- A voided check or checkbook showing account routing number so that refunds can be directly deposited, or taxes paid electronically

Due to the pandemic, we will be using a low-contact method for preparing your tax return. We will be working with you in-person but with limited face-to-face contact.

For any questions regarding your tax appointment please contact Downers Grove AARP Tax Aides by phone or email: • Phone number: 331-489-9875 • Email address: aarpdg@yahoo.com