

AARP Tax Assistance at the Downers Grove Park District

Assistance will be provided by IRS counselors of the VITA/TCE (Volunteer Income Tax-Aide/Tax Counseling for the Elderly) program again this year. There is no charge for this AARP sponsored service.

Available by APPOINTMENT ONLY

Days: Tuesdays and Thursdays

Dates: February 1 - April 12, 2021

Times: 9:00 am - 12:00 pm

Due to the pandemic, we will be using a no-contact method for preparing your tax return. We will be working you remotely, either over the telephone or by email, to prepare your tax return.

If you do not have an email address or access to a trusted friend's or relative's email address, we will not be able to help you right now. You could consider visiting the AARP Tax Aide site at the Westmont Park District. They are open on Mondays and Wednesdays.

Here is how the process will work:

When you call the Downers Grove Park District to make an appointment, they will take your name and phone number and instruct you to call the **Downers Grove AARP Tax-Aide number at (331) 481-9875**. When you call that number, you will be asked to leave a message with your name, phone number, and an email address which the AARP Tax Aides can use to contact you.

You will also be given instructions on which documents to gather, the AARP forms to prepare, and the email address you can send the documents to.

Since we are not permitted to have face-to-face contact with you, we will need to have electronic copies of the documents we need to complete your tax return. You will need to create electronic copies of all your tax documents we need to complete your return. You can make copies by taking photos of them with a smartphone, scanning the documents with a scanner, or going over to an office supply store like OfficeMax or Staples and use one of the photocopying machines to create electronic copies.

The AARP Tax Aides will also send you these instructions as well as the AARP forms to the email address you provided.

Once you have completed all your forms to the best of your ability and gathered your tax documents, you can send them to the email address which the AARP Tax Aide provided you. When the AARP Tax Aide received your information, they will contact you and let you know the date and approximate time they will work on your return. AARP Tax Aide will also give the Downers Grove Park District this same information.

On the date and time we process your return, you must be available to take phone calls

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from us. You must answer your phone during this time so we can go over your documents with you and answer any questions we may have.

Once we complete the return, we will send you a copy of the return via email and we will review it with you. After your approval, we will file the return electronically.

Here is a list of the items which you will need to scan:

- **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!** For an individual return, the **taxpayer must be present on the call**; for a joint return **BOTH spouses must be present on the call.**
- 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)
- 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
- Proof of health insurance (Form 1095 A, B, or C)
- **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 2019**
- A **voided check or checkbook** showing account routing number so that refunds can be directly deposited, or taxes paid electronically