AARP Tax Assistance

It's that time of year again...**FOR TAX ASSISTANCE FOR THOSE WHO NEED IT MOST**

The mission of the AARP Tax-Aide program is to provide free basic tax preparation for **low-to-moderate income and elderly taxpayers.** Tax-Aide counselors are volunteers who are restricted (by their training, and by IRS and AARP policies) as to the complexity of returns they are qualified to prepare. Examples of returns Tax-Aide volunteers are **NOT** trained to prepare: Partnership returns from forms K1; business returns; self employment returns (Schedule C) with a loss; rental income; sale of business property; S Corporation returns; trust and estate income; moving expenses; out of state returns; returns involving numerous stock transactions. This list is not all inclusive; counselors can make determinations at time of appointment as to whether a return is out of scope.

We will be scheduling appointments, **IN-PERSON** at the Senior Center for Bloomingdale Township Seniors, at 8:30am on: January 23rd (Thursday), January 24th (Friday), January 27th (Monday), and January 28th (Tuesday). During that period phone calls will not be permitted for scheduling an appointment. **Proof of residency will be required.**

Starting January 29th (Wednesday) we will start taking phone calls to schedule appointments (if available) for all Bloomingdale Township residents. Call 630-529-7794. **Proof of residency will be required.**

Non-residents can call to schedule appointments (if available) starting January 31st (Friday). Call 630-529-7794.

The AARP Tax-Aide Program will begin on Friday, February 7th, 2025 and continue through Friday, April 11th, 2025. Appointments will be made for Mondays and Fridays. Please arrive 15 minutes prior to your appointment and allow at least an hour for your appointment time. If filing a joint return, both spouses **must** attend the appointment unless the attending spouse has Power of Attorney for financial matters.

What to bring to your scheduled appointment: (checklist will be provided during scheduling)

1. Photo ID & SS card/s for taxpayer & spouse; SS card for all dependents listed on return

2. Copy of last year's return.

3. All forms received showing income for 2024. This includes, but is not limited to, the following: W-2's, interest income (may not receive 1099-INT), dividends, broker statements, social security (SSA-1099), railroad retirement, IRA distributions, pensions, gambling winnings and losses, proceeds from sale of stock, bond or mutual fund, refund of Illinois income tax from last year, self-employment income and expenses, and any other income for which you may not have received a statement. Ride-sharing drivers MUST provide WRITTEN evidence from company for claiming income and expenses.

4. All documents relating to the sale of stock, bond or mutual fund, including original purchase documents.

5. If you itemize, information pertaining to deductions, i.e. medical expenses, charitable contributions, separated and totaled by category .

6. Checks or data supporting quarterly prepayment of federal and state taxes.

7. Real estate tax bill.

8. All documents pertaining to the Affordable Care Act.

9. Direct deposit or direct debit is recommended if a refund is due; bring a check for routing and account number information.

If your filing status is:	And at the end of 2024 you were:	Then file a return if your gross income (**not including social security**) was at least:
Single	Under 65 65 or older	$14,600 $16,550
Married Filing Jointly	Under 65 (both spouses) 65 or older (one spouse) 65 or older (both spouses)	$29,200 $30,750 $32,300

There is no charge for this assistance.