

Volunteers Provide Free Tax Preparation

AARP Tax-Aide volunteers will be available to assist you in completing your income tax returns at sites throughout York County, beginning in February. Select a site convenient for you and call to schedule an appointment. The volunteers can assist with most forms and returns.

Intake documents that you need to complete before your appointment will be available at our locations or on the website: <https://www.yorkaarptaxaide.com/>

Federal Income Tax Return

You **must or should** file a return if any of the following situations apply to you:

1. Your gross income exceeds the threshold for your age and filing status.
2. You had taxes withheld from your pay or retirement or made estimated tax payments.
3. You had net earnings from self-employment of more than \$400.
4. You received a Premium Tax Credit as part of the Affordable Care Act.
5. You received a Health Savings Account distribution.
6. You owe a penalty for an early distribution from a retirement account
7. You previously deferred paying taxes on a retirement account distribution because of COVID.
8. You are eligible for the Earned Income Credit.

State Income Tax Return

Many persons who do not have to file a Federal return must still file a Pennsylvania return. If you have \$33 or more of income from things like wages, interest, dividends, capital gains, or life annuity distributions, you need to file a Pennsylvania return. The AARP volunteer will determine whether you qualify for our state's "tax forgiveness" rules, which can reduce or eliminate any state income tax owed.

Local Return

If you received one, please bring the Local Tax Return form mailed to you by the York-Adams Tax Bureau.

Rent/Property Tax Rebates

If you meet income and age guidelines, Property Tax and Rent Rebate forms will be completed. Please bring proof that you paid property taxes in 2022, if you own your home. If you rent, bring the state's rent certificate form signed by your landlord or other proof of rent paid.

No Need to File

If you know that you do not need to file an income tax return and want to complete only a Property Tax or Rent Rebate application, please state that when you call for an appointment. You may be given an appointment time for a rebate-only return.

If you are not sure if you need to file a federal or state return, please bring all your documents to one of our sites. We will review them and help you make that determination.

WHAT SHOULD YOU BRING TO YOUR TAX APPOINTMENT?

After you make an appointment, the next step is to **make sure that you are prepared** before the appointment. It is important that you bring with you all of the information and documents needed to complete the tax returns and other forms.

Bring any of the following that apply to you:

1. Your completed Intake form.
2. **All tax forms** that you received through the mail, or you printed from the internet.
3. A copy of **tax year 2021's** federal, state and local income **tax returns**, and Property Tax/Rent Rebate returns.
4. Your picture identification cards, such as a drivers' license, and your and any dependents' Social Security cards.
5. Verification of all employment income you received during the year, e.g., wages (W-2) or self-employment (1099-NEC).
6. 1099 forms for interest, dividends, capital gains, unemployment payments, IRA distributions, pensions, Social Security benefits, etc.
7. Brokerage statements.
8. A record of cash donations to any charitable organization.
9. Affordable Care Act Form 1095-A.
10. Record of gambling and lottery winnings and proof of gambling losses.
11. If you want to itemize deductions, **totals** for medical expenses, charitable contributions, property taxes, mortgage interest, and volunteer and medical mileage.
12. 2022 property tax receipts for both County and School, with the tax collectors "Paid" stamp on them. If you don't have those, bring your cancelled checks or mortgage statement, if paid through escrow.
13. Rent certificates completed by landlord (for rent rebate applicants).
14. A copy of a check or other document that displays bank account number and bank name for direct deposit of any refund.

It is important that you come fully prepared so our volunteers can ensure you receive all benefits that are rightfully yours, and to eliminate the need for you to make a second trip.

Homebound individuals should schedule an appointment at a site and have a designated representative take your paperwork to the appointment.

For questions, please call our voicemail line at 717-640-5006 or email us at info@yorkaarptaxaide.com