

AARP

TAX-AIDE PROGRAM 2018

Free Income Tax preparation provided by AARP Foundation / Tax-Aide Volunteers is available for simple Federal and NJ returns only. Service is available in person on a first-come, first-served basis.

A limited number of returns may be prepared each session.

PLEASE NOTE: all taxpayers must be present when their tax return is prepared.

If filing a joint return, both taxpayers must be present.

Documentation requirements are listed on reverse side of this flyer.

Mondays & Thursdays from 9:00 am - 3:00 pm*
Tuesdays from 6:00 pm - 7:00 pm

*** Doors to enter building will be opened at 8:30 am.**

Starts: Thursday, February 22 from 9:00 am - 3:00 pm

Ends: Thursday, April 12 from 9:00 am - 3:00 pm

Thursday, February 22 9:00 am - 3:00 pm

Monday, February 26 9:00 am - 3:00 pm

Tuesday, February 27 6:00 pm - 7:00 pm

Thursday, March 1 9:00 pm - 3:00 pm

Monday, March 5 9:00 am - 3:00 pm

Tuesday, March 6 6:00 pm - 7:00 pm

Thursday, March 8 9:00 am - 3:00 pm

Monday, March 12 9:00 am - 3:00 pm

Tuesday, March 13 6:00 pm - 7:00 pm

Thursday, March 15 9:00 am - 3:00 pm

Monday, March 19 9:00 am - 3:00 pm

Tuesday, March 20 6:00 pm - 7:00 pm

Thursday, March 22 9:00 am - 3:00 pm

Monday, March 26 9:00 am - 3:00 pm

Tuesday, March 27 6:00 pm - 7:00 pm

Thursday, March 29 9:00 am - 3:00 pm

Monday, April 2 9:00 am - 3:00 pm

Tuesday, April 3 6:00 pm - 7:00 pm

Thursday, April 5 9:00 am - 3:00 pm

Monday, April 9 9:00 am - 3:00 pm

Tuesday, April 10 6:00 pm - 7:00 pm

Thursday, April 12 9:00 am - 3:00 pm

If you need Tax Forms:

Tax forms can be downloaded via the State of New Jersey and IRS websites.

Federal forms can also be ordered on the IRS website, to be mailed to your home.

For assistance, please stop by the Reference Desk at any branch. Printing fees apply for tax forms printed at the library.

Website for State of NJ forms:

<http://www.state.nj.us/treasury/taxation/forms.shtml>

Website for IRS forms:

<http://www.irs.ustreas.gov/>

NOTE: These hours are an approximation. Depending on the volume of tax clients being served, the tax assistants may stop taking new clients an hour or more before the end time listed.

SEE REVERSE SIDE FOR DOCUMENTATION REQUIREMENTS.

FREE OF CHARGE

Monmouth County Library - HEADQUARTERS

Monmouth County's Community Center

125 Symmes Drive, Manalapan, NJ 07726-3249

Telephone: 732-431-7220

www.monmouthcountylib.org

Here is a listing of Required Forms AARP Tax-Aide volunteer preparers need taxpayers to bring in order to prepare their return. There may be others if the taxpayer has a unique situation, but these are the most common.

PLEASE BRING IDENTIFICATION

- Social Security Card or other official document from SSA with Social Security number and full name. This is required for the taxpayer, spouse (if joint return) and all dependents.
- Driver's license or other government photo ID for the taxpayer and spouse (if joint return)
- A check (may be blank or canceled) is required if you are requesting direct deposit of your refund.

PLEASE BRING TAX FORMS AND SUPPORTING RECORDS

- Copy of last year's tax return (particularly if taxpayer itemized deductions in the prior year or if there is a capital loss carryover)
- W-2 for each employer
- Unemployment Compensation Statement (NJ no longer mails this so the taxpayer needs to print it out online)
- SSA-1099 if paid Social Security Benefits
- All 1099 forms (1099-INT, 1099-DIV, 1099-B, etc.) and documentation showing original purchase price of any assets sold
- 1099-MISC showing miscellaneous income
- 1099-R for any payments from a pension, annuity or retirement account
- All forms relating to federal income tax paid
- Dependent Care Provider information
- Supporting records if itemizing deductions (property tax, mortgage interest, medical expenses, charitable deductions, Homestead rebates, PTR rebates etc.) Please bring PTR blue book.

PLEASE BRING AFFORDABLE CARE ACT DOCUMENTATION REQUIREMENTS

If the taxpayer, spouse (if joint) and/or any person who could be claimed as a dependent did not have health insurance for the entire year, or if insurance was provided through the Healthcare Marketplace/Exchange, you will need the following:

- A month by month listing showing for each person on the return, which months they had insurance and which months they were uninsured
- Information to determine if the reason the person was not insured qualifies for an exemption
- Exemption Certificate Number (ECN) if an exemption was granted by the Healthcare Marketplace/Exchange
- Form 1095-A (sent automatically if insurance was purchased through the Healthcare Marketplace/Exchange)
- Income information for each dependent listed on the return (only if dependent has a filing requirement)
- Income information (includes AGI, exempt interest, and untaxed social security) for each dependent listed on the return who has a requirement to file a return.
- If insurance was offered by an employer, but was refused we will need the cost of the insurance for both individual coverage and family coverage.