We are pleased to announce that for the 2025 tax season AARP Tax-Aide will have appointments available at the following locations:

Plainfield-Guilford Township Public Library (PPL), 1120 Stafford Rd., Plainfield, IN 46168, on **Mondays** beginning on February 3, 2025 through April 7, 2025. Except for Feb 17,2025 when the library will not be available.

Washington Township Park Pavilion Center, 115 S. County Road 575, Avon, IN 46123, on **Tuesdays** beginning on February 4, 2025 through April 8th 2025. The only exception will be that on March 25 and April 1, 2025 the Center will not be available and we will be at the Plainfield-Guilford Township Public Library.

Avon-Washington Township Public Library, 498 N Avon Ave., Avon, IN 46123, on **Thursdays** beginning on February 6, 2025 through March 20, 2025. **Two visits will be required for this site only.** During the **first** visit interviews will be done and tax documents scanned. Then volunteers will prepare tax returns from their homes. The **second** visit will be the following week (on the same day/time as the first appt.) where returns will be reviewed, signed, efiled and printed.

WE ASK THAT YOU **NOT** CALL THE HENDRICKS COUNTY SENIOR CENTER, THE WASHINGTON TOWNSHIP PARK PAVILION CENTER OR THE AVON-WASHINGTON TOWNSHIP PUBLIC LIBRARY. Our sponsors are not adequately staffed to handle telephone calls regarding tax preparation nor do they have access to our scheduling service.

Appointments will be available beginning January 21, 2025.

Book your appt online aarpfoundation.org/taxaide

This is the most efficient and preferred way to book an appointment. Go to Search for **AARP Foundation Tax-Aide Locator**, select your preferred location (all 3 Hendricks sites will be available) and continue to book your appt.

Book your appt by phone

For appts at the Plainfield Library

Call **317-839-6602 ext 2** to speak with a library staff member

For the Avon-Wash Park Pavilion Center or the Avon Library Site

Call our AARP volunteer phone line at **317-406-7129.** Leave a message and an AARP volunteer will return your call within 3 days

How AARP Foundation Tax-Aide Can Help You Today

We offer free tax return preparation to anyone who needs it. AARP Foundation Tax-Aide volunteers are trained to help you file a variety of income tax forms and schedules.

In certain situations, however, our volunteers may be unable to provide assistance. The Volunteer Protection Act requires that our volunteers stay within the scope of tax law and policies set by the IRS and AARP Foundation. Here's a guide to what our Tax-Aide volunteers can — and can't — do.

We can prepare most returns with:

- Wages, interest, dividends, capital gains/losses, unemployment compensation, pensions and other retirement income, Social Security benefits.
- Self-employment income, with limits.
- Most income reported on Form 1099-MISC. or Form 1099-NEC.
- Schedule K-1 that includes only interest, dividends, capital gains/losses or royalties.
- Charitable cash contributions
- Qualified Business Income deduction.
- Economic Impact Payments (aka Stimulus Payments).
- Itemized deductions, including noncash contributions to charity that total no more than $5,000.
- Cancellation of nonbusiness credit card debt.
- IRA contributions — deductible or not.
- Most credits, such as earned income credit, education credits, child/additional child credit and credit for other dependents, child/dependent care credit, premium tax credit, simplified method foreign tax credit, self-employed sick leave or family leave credit, and retirement savings credit.
- Repayment of first-time homebuyer credit.
- Estimated tax payments.
- Injured spouse allocation, depending on state.
- Health Savings Accounts (HSA).
- Amendments to filed returns.
- Prior three tax years' returns.

We can't prepare returns with:

- Self-employment if there are employees, losses, expenses that exceed $35,000, depreciation, business use of home, 1099 filing requirements or other complicating factors.
- Hobby income or other activities not for profit
- Complicated capital gains/losses, such as futures or options.
- Complicated Schedule K-1.
- Rental income, except land-only rentals or rentals of personal residence less than 15 days.
- Royalty income with expenses if not from self-employment.
- Tax on a Child's Investment and Other Unearned Income (Kiddie Tax).
- Farm income or expenses.
- Moving expenses.
- Some investment income or itemized deductions that are not included in our training.
- Alternative Minimum Tax, Additional Medicare Tax, or Net Investment Income Tax.
- Foreign financial asset reporting requirements.
- Any virtual currency investment or transaction.

AARP Foundation® Tax-Aide

AARP FOUNDATION TAX-AIDE

Taxpayer Information and Responsibilities

Welcome to AARP Foundation Tax-Aide. Our IRS-certified volunteers will assist you shortly. In the meantime, please take a moment to read the following information.

Taxpayers will:

- Provide all required information and documents to ensure the completion of your return
- Sign in at the tax site and follow the guidance of the volunteer
- Complete the Intake Booklet fully and accurately
- Participate in the intake interview, tax preparation and quality review process
- Inform the volunteer of all income including cash, gambling winnings, etc.
- Understand that some returns are beyond the program scope (see scope poster) or have complicated state or other issues. If your return falls outside the program scope, you must either prepare your own return or engage a professional preparer.
- Ensure the return is complete and accurate before signing. Joint returns require the signature of both spouses.
- Agree that you are responsible for the accuracy of the return
- Treat volunteers with courtesy and respect
- Questions? Call 888-687-2277 or email taxaide@aarp.org

Tax-Aide volunteers will:

- Treat taxpayers in a courteous and professional manner
- Prepare tax returns within the scope of the program
- Provide tax assistance based on the information and documents provided by the taxpayer
- Quality review all tax returns
- Respect taxpayers' privacy and confidentiality

Essential Documents to Have at the Tax Site

- ☐ Government-issued photo ID for the taxpayer(s) on the return
- ☐ Social Security cards or ITIN documentation for all
- ☐ Copy of prior two years' tax returns
- ☐ Income documents for wages, interest, dividends, capital gains/losses, unemployment compensation, pensions and other retirement income, Social Security benefits and self-employment.
- ☐ Brokerage statements – sale of stocks or bonds
- ☐ Healthcare – Forms 1095-A if have marketplace insurance
- ☐ Mortgage interest, medical/dental expenses, charitable donations, sales, income or property taxes
- ☐ Records of federal and state income taxes paid
- ☐ Educational expenses – Form 1098-T, student's detailed financial school account; other education expenses
- ☐ Checking or savings account info (printed or actual copy) for direct deposit of refund or direct debit of balance due
- ☐ IRS letters showing Economic Impact Payments (EIPs) and Advanced Child Tax Credit payments received
- ☐ Any other recent IRS or state tax department correspondence

Tax-Aide Process

Waiting Area	Tax Preparation	Quality Review
Sign In	IDs, SS Cards Checked	IDs, SS Cards Checked
Complete Intake Booklet	Intake Booklet and Tax Documents Reviewed	Intake Booklet and Tax Documents Reviewed
Organize Your IDs, SS Cards and Tax Documents	Taxpayer Interviewed	Taxpayer Interviewed
	Tax Return Prepared	Tax Return Reviewed
		Return Signed

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AARP Foundation Tax-Aide