

**Tax Preparation Assistance**  
**Woodridge Park District, Community Center**  
**2600 Center Dr, Woodridge**

Free tax preparation and e-filing by IRS-certified volunteers in the [AARP Foundation's Tax-Aide](#) program.

- **Appointment reservations (required):** go to [taxaide.aarpfoundation.org](http://taxaide.aarpfoundation.org) or call (331) 201-2676
- **Appointment dates:** Mondays & Fridays, 9:00 am – 2:00 pm, February 2 – April 10, 2026.
- **Location:** Woodridge Park District Community Center, 2600 Center Dr., Woodridge, IL

*One appointment needed for each tax return. Stock or mutual fund sales require March or April appointment.*

Tax returns we can prepare, and those we cannot: [bit.ly/woodridge-c2467](http://bit.ly/woodridge-c2467)

Taxpayer responsibilities: [bit.ly/woodridge-d20232](http://bit.ly/woodridge-d20232)

Other tax prep sites: [bit.ly/woodridge-links](http://bit.ly/woodridge-links)

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## IDENTITY VERIFICATION (Required by IRS)

→ You **MUST** bring the following **Identify Verification documents**. *Photocopies not accepted.*

- ◆ **Government-issued photo I.D.** for every signer of the tax return
    - individual tax return: the taxpayer **MUST BE PRESENT** and **sign the return**
    - married filing jointly: **BOTH SPOUSES MUST BE PRESENT** and **sign the return**
  - ◆ **Social Security card\* or ITIN notice/card** for every person listed on the tax return, including
    - taxpayer, spouse, **dependents**
      - if necessary, order replacement card at [www.ssa.gov/number-card/replace-card](http://www.ssa.gov/number-card/replace-card)

*\*Form SSA-1099 is the only document which can substitute for a person's Social Security card*
  - ◆ **Identity Protection PIN** if you, your spouse, or dependent received one from the IRS or state.
    - IRS issues new PINs annually! State PIN doesn't change.
      - Retrieve your IRS PIN at [www.irs.gov/identity-theft-fraud-scams/retrieve-your-ip-pin](http://www.irs.gov/identity-theft-fraud-scams/retrieve-your-ip-pin)
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## **PREPARE FOR YOUR TAX APPOINTMENT (do this at least one week before appointment)**

1. **Complete our Intake form** and bring the completed form to your appointment.

There are two ways of getting this form:

- a. **Go to [bit.ly/form13614C](http://bit.ly/form13614C)**, then download, print, and fill in the form.
- b. **Pick up a tax packet** at the Woodridge Park District building, 2600 Center Dr. *The tax packet contains the Intake form and this information sheet.*

2. **Collect your identify verification and tax documents** (see above and next page)

## **WHEN YOU ARRIVE**

We're located on the lower level. A volunteer will do **ID verification**, review your Intake form and tax documents, then move your documents to a tax counselor. We'll review the finished tax return with you, give you a paper copy for your files, and return your original documents. **Appointments average 1 hour in length.** Some take less time but some require more, **so please block out 2 hours in your schedule.**

- We will **e-file** your federal & state tax returns later in the day and contact you *only* if there's a problem.
- **We cannot prepare tax returns for paper filing** unless a paper return is required by the IRS or state.

## WHAT TO BRING TO YOUR TAX APPOINTMENT

- Identity Verification documents** (see previous page). *Photocopies of ID documents will NOT be accepted.*
- Completed **Intake form** (see previous page)
- 2024 tax return** and 2024 tax documents. *Electronic forms MUST be printed in advance.*

**Your 2025 tax documents.** *Remove from envelopes. Electronic forms MUST be printed in advance.*

- SSA-1099** or **RRB-1099** for Social Security, Railroad Retirement income
- 1099-R** forms for pensions, 401(k), & IRA distributions
- W-2** forms from every employer
- 1099-INT, 1099-DIV, 1099-B** forms showing interest, dividends, and brokerage transactions.  
**December bank statement** if no 1099-INT received from bank.
- Other 1099** forms if received, such as 1099-G, 1099-MISC, 1099-NEC, 1099-K
- Income** from any other sources
- Property tax bill** and record of payment
- Voided personal check** showing account & routing numbers (for [direct deposit](#) of refunds)
- Letters** from IRS or state tax department, if you received any

### Less common tax forms

- Self-Employment** worksheet (if self-employed): [bit.ly/self-employed-worksheet](https://bit.ly/self-employed-worksheet)
- Tip income** worksheet (not for self-employed): [bit.ly/tips-worksheet](https://bit.ly/tips-worksheet)
- Overtime** worksheet: [bit.ly/overtime-worksheet](https://bit.ly/overtime-worksheet)
- Schedule K-1** (*please contact us in advance to be sure we can prepare your tax return*)
- W2-G** form showing income from gambling winnings
- Education Credits worksheet** for college/career school expenses: [bit.ly/edcredits-worksheet](https://bit.ly/edcredits-worksheet)  
**1098-T** form from college or career school  
**Statement** from the educational institution showing tuition & fees paid and scholarships & grants received
- 1098-E** form showing student loan interest
- 1099-SA** form showing HSA *distributions*, plus records of any 2025 HSA *contributions* you made between 1/1/2025 and 4/15/2026. (You don't need to bring records of contributions made by paycheck deduction.)
- 1095-A** form if you purchased health insurance through the *Get Covered Illinois* marketplace (Obamacare)
- Estimated tax payments** if made to IRS or state
- Interest on Vehicle Loan** Worksheet: [bit.ly/car-loan-worksheet](https://bit.ly/car-loan-worksheet)
- Home Sale**: bring documents for sale & original purchase, costs of improvements.  
Worksheet: [bit.ly/home-sale-worksheet-2](https://bit.ly/home-sale-worksheet-2)
- Childcare or Dependent Care** expense statement or letter from care provider  
Statement/Letter must include provider's name, address, phone number, Employer Identification Number (EIN) or Social Security number, amount you paid to provider, your name, child/dependent's name

**Itemized Deductions.** (Optional; most people do better with the [Standard deduction](#))

- Itemized deductions worksheet**: [bit.ly/deduct-worksheet](https://bit.ly/deduct-worksheet)
- If you can't access the worksheet, bring a summary of medical/dental/vision expenses that **you** paid, summaries of (1) cash and (2) [value](#) of noncash donations to charity; your 1098 form for mortgage interest.