

AARP Foundation[®] **Tax-Aide**

SOUTHBELT AREA SITE

Parker Williams Library – 10851 Scarsdale Blvd.
Operating: Feb. 2nd to April 13th

Site Operating Hours

Monday and Friday – 10AM to 2PM

Taxpayer Responsibilities

Upon Arrival, Tax Payers will sign-in with our Client Facilitator and provide:

(1) Photo ID of each Taxpayer and Spouse (if applicable) and Social Security Cards or ITINs of each person on the tax return. An official Government issued document with the complete Social Security Number is acceptable. Form SSA-1099 is acceptable with the entire SSN.

(2) Each Taxpayer (one if married filing jointly) will complete an Intake/Interview Quality Review booklet before seeing a Tax Counselor.

(3) A copy of your last year (2023) tax return is advised in order to complete an accurate return.

(4) All of your Tax Documents such as W-2, 1099, 1095A (Govt. sponsored health insurance), IRS Letters, Identity Protection PIN if applicable. A copy or voided check for direct deposit information.

(5) Itemized deductions should be summarized, prior to arrival, if you plan to itemize deductions.

(6) Tax Preparation Packets with instructions and the Intake/Interview booklet will be available in advance for pick-up at the library's front desk during non-operating hours. Fill out the Intake/Interview booklet and place all tax documents in the tax envelope prior to your arrival at the site. The Packets will be available in the site room during our normal operating hours to be filled out the same day of tax preparation.

After all of the above requirements are complete, you will be assigned to your 1st Tax Counselor for data entry and tax law compliance; and a 2nd Tax Counselor for a Quality Review. You will sit with the Tax Counselors and answer any questions while they are completing your return.

When complete you will be required to sign form 8879 to allow the required electronic transmission of your return. If Married Filing Jointly, each taxpayer must sign the same form.

You will be given a copy of the return for your personal files and your tax return will be transmitted electronically to the IRS.

We look forward to working with you! -- The Parker Williams Tax-Aide Team

VISIT WWW.TX3D5.COM FOR MORE INFORMATION

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