

Tax Assistance

AARP Tax-Aide is the nation's largest volunteer-run tax counseling service, preparing tax returns and answering tax questions free of charge for taxpayers of all ages with middle and low income, with special attention to those 60 years of age and older. The program offers free, quality, confidential tax preparation service. Please note that those taxpayers with complex tax returns containing rental properties, business income with more than \$10,000 in expenses or large number of stock transactions will be advised to seek professional tax assistance.

Tax preparation assistance will be available from February through early April at Services for Older Citizens by appointment only at 313-882-9600. Should you need help organizing your documents prior to your appointment please call ahead of time for assistance.

For Your Appointment You Will Need:

- Last year's tax return
- Social Security cards and official documentation for yourself and all dependents
- Checkbook if you want direct deposit of any refund

Income:

- W-2 from each employer
- Unemployment compensation statements
- SSA-1099 form showing the total Social Security benefits paid to you for the year, or Form RRB-1099, Tier 1 Railroad Retirement benefits
- 1099 forms reporting interest (1099-INT), dividends (1099-DIV), proceeds from sales (1099-B) as well as documentation showing the original purchase price and date of your sold or worthless securities
- 1099-R forms for pension/annuities or IRA payments and 1099-MISC form showing any miscellaneous income
- 1099-G Gambling winnings
- All self employed earnings as long the expenses do not exceed \$10,000.

Payments: You will need to bring all forms and canceled checks indicating federal and state income tax paid including quarterly estimated tax payments.

Deductions: Most taxpayers have a choice of taking either a standard deduction or itemizing their deductions. If you have a substantial amount of deductions, you may

want to itemize.

- 1098 form showing any home mortgage interest
- Receipts for medical /dental expenses (including doctor and hospital bills and medical insurance premiums, receipts for prescription medicines, costs of assisted living services and bills for home improvements, such as ramps and railings for people with disabilities
- Receipts of contributions to charity
- Receipts or canceled checks for all tax income and property taxes you paid, as well as records of tax refunds plus taxes assessed in the tax year that have not been paid
- Losses from gambling if gambling income was declared

Credits:

- Dependent care provider info (name, employer ID)
- Receipts or 1099 forms for continuing education
- Copy of all property tax bills for 2012 (paid or not)
- Copy of gas bill showing total out of pocket expenses for home heating