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# Taxpayer Information and Responsibilities

## 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](tel:888-687-2277) or email [taxaide@aarp.org](mailto: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 taxpayers and dependents named on the return
- 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
- 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