



FREE Certified Tax Preparation

Thursday Afternoons
February to April
in Prospect Heights

By Appointment Only
REGISTER ONLINE
or Call 847.925.6001

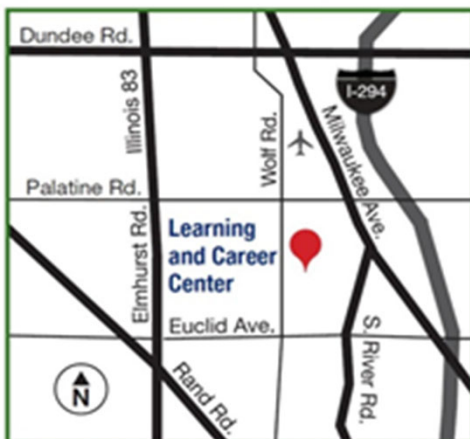


tinyurl.com/2023PHTaxAide

AARP Foundation[®]
TAX-AIDE

Free tax assistance for those who need it most
No restriction on age or income
Service is provided in English

All Requirements & Restrictions on Reverse →



Located at the:



Harper College

*Learning and
Career Center*

1375 South Wolf Road
Prospect Heights, Illinois 60070

Requirements & Restrictions

Before your Appointment:

- Complete ALL pages of Form 13614-C (Intake/Interview & Quality Review Booklet) – Copies at Harper LCC Reception
- If you have tax documents on your phone or other digital devices, you must print them out prior to your visit.
- If you need language assistance you must find an interpreter yourself - appointments are in English.
- If you are a student:
 1. Know if your parents are claiming you as a dependent or if you are supporting yourself.
 2. We may need to view your school's financial statement.
 3. Prepare total expenses for required books & supplies.

Bring all Relevant Documents on the Day of your Appointment:

- **REQUIRED: Government-issued Photo ID** for you (& your spouse if married filing jointly). Both spouses MUST be present unless the spouse in attendance has a financial Power of Attorney for the absent spouse.
- **REQUIRED: Social Security card or ITIN** for ALL people on the return, including dependents. Accepted formats: 1) Social Security Card; 2) SSA-1099 form showing all 9 digits of your SSN; or 3) prior year's tax return prepared by the Tax-Aide program or a professional preparer.
- **All IRS letters** such as **IRS-issued Identity Protection PIN** (If you have received one)
- **2023 Tax Year Documents.** Please bring all tax documents that you received. Most of these documents come in envelopes marked *IMPORTANT TAX DOCUMENT ENCLOSED*.
 - SSA-1099** (Shows Social Security benefits paid in 2023)
 - W-2**
 - 1099-INT**
 - 1099-DIV**
 - 1099-B** (Brokerage statement)
 - Schedule K-1**
 - 1099-R** (Distributions from pensions, annuities, retirement, profit sharing, IRA, etc.)
 - 1099-MISC**
 - 1099-NEC** (Income as independent contractor or self-employment)
 - 1099-G** (Unemployment or state refund)
 - 1098** (Mortgage Interest)
 - 1095-A** (Marketplace Health Insurance)
 - 1095-B**
 - 1095-C**
 - Property Tax Bill** (Second or final tax bill paid in 2023)
 - Medical Expenses** (For itemizing: Please total prior to your arrival.)
 - Charitable Contributions.** (For itemizing: Please total prior to your arrival.)
 - 1098-E** (Interest paid on student loans)
 - 1098-T** (Tuition Statement)
 - RRB-1099-R** (Railroad Retirement)
 - 1099-K** (Income through 3rd party payment network such as Uber, Lyft, Door Dash, etc.)
 - 1099-C** (Cancellation of debt of non-business credit card debt)
 - 1099-S** (Proceeds from sale of home or real estate)
 - 1099-SA** or **5498-A** (Distribution from HSA)
 - W-2 G** (Gambling winnings)
 - Alimony Information** if you paid or received alimony in 2023. You will need your former spouse's SS number.
- **2022 Tax Return**
- **Personal check or bank letter** showing the bank's routing number & your account number for direct deposit of refund or direct debit to pay amount due. **Deposit slips are NOT acceptable.**

Tax-Aide volunteers are not trained for all situations. They do NOT prepare returns that include:

- Purchase, sale, or exchange of cryptocurrency
- Bankruptcy
- Rental income
- Alternative Minimum Tax, Additional Medicare Tax, or Net Investment Income Tax
- Hobby income or other activities not for profit
- Complicated Schedule K-1
- Out of state tax returns
- Self-employed with inventory
- Self-employed with Marketplace Insurance
- Self-employed with either net loss or prior year carry-forward loss