AARP Foundation Tax-Aide
Taxpayer Information and Responsibilities

This Tax-Aide site is staffed with volunteers that have been trained and certified by the IRS to prepare a range of individual income tax returns. Please take a moment to read the following information which will ensure a smooth process for both you and the volunteers at this site.

➤ We are here to assist you in the preparation of your tax return and we rely that you provide us with true, accurate, and complete information. *If the volunteer preparer is not comfortable with the information provided by you, this site is not obligated to prepare your return.*

➤ You, and not AARP Foundation or the Tax-Aide volunteer, are solely responsible for the accuracy of your return(s). If an error results in any underpayment of tax, you are responsible for paying it, plus any interest and penalty that may be due. **Before you leave, make sure you are satisfied that your return was prepared accurately and completely.**

➤ There are some types of returns that we cannot assist you with. Some taxpayers have situations that require a tax form that is outside the scope of our program and the IRS certification we are trained for. *If you have any of those situations, then this site will not be able to prepare your tax return, even if this site has done so in the past.*

➤ Once your return is prepared it will be given a quality review by a second trained and certified volunteer. This quality review service is done for your benefit to help ensure that your return is prepared thoroughly and accurately. When completed, a copy of your tax returns will be printed for you to keep for your records.

By signing the Form 8879 that the volunteer will ask you to sign upon completion of your taxes, you are verifying the return is true, accurate, and complete to the best of your knowledge. Signing also acknowledges you have read and understand the statements made above. Finally, signing Form 8879 authorizes us to electronically submit your tax return to the Internal Revenue Service and the WI Department of Revenue.

What To Bring

Watch for and keep any envelopes that say "IMPORTANT. TAX RETURN DOCUMENT ENCLOSED" or similar language. Most tax forms have a January 31st mailing deadline, but certain forms such as the 1099-DIV for dividends and the 1099-B for capital gains/losses may have a February 15 deadline. Investment firms sometimes have an extension from the IRS so you might not receive their statements until sometime in March. If not received by mid-February, check.

You should bring a copy of last year's (2023) tax return to your appointment as well as all required 2024 documentation, including but not limited to:

- Completed Intake/Interview & Quality Review Form 13614-C and Wisconsin Tax-Aide Information Sheet
- Proof of identity (**Photo ID** and **Social Security card** for everyone included on the tax return)
- Financial institution routing and account numbers if you want your refund direct deposited or taxes owed direct debited (Best to bring checkbook)
- IRS assigned Identity Protection PIN [**IP PIN**], if applicable
- Wage and Earnings statements [Form **W-2**]
- Social Security benefits [Form **SSA-1099**] / Railroad Retirement benefits [Form **RRB-1099**]
- Pension / Annuity / IRA statements [Form **1099-R**]
- Taxable Interest [Form **1099-INT**]
- Stock Dividends / Capital Gains [Form **1099-DIV** or Consolidated Brokerage Tax Statement] *Forms may not be received until Feb. 15 or later…schedule appointment accordingly*
- Stock or Bond sales [Form **1099-B** or Consolidated Brokerage Tax Statement] *Forms may not be received until Feb. 15 or later…schedule appointment accordingly*
- Real Estate Property Tax Bill for 2024 and record of property taxes actually paid in calendar year 2024 <or> rent paid for primary residence in 2024
- Rent Certificate signed and dated by landlord (if applying for Homestead Credit)
- Health Insurance premiums paid in 2024 incl. Affordable Care Act [Form **1095-A**, **B**, or **C**] or proof of exemption
- Supplemental Health & Dental Insurance premiums paid
- Information for itemizing deductions, if applicable
- Miscellaneous Income [Form **1099-MISC**]
- Federal and/or State SSI Income, W2 payments, or other public assistance
- Records of any federal or state quarterly estimated payments made
- Any other forms or information as needed to complete your tax return

To save time, please take the tax forms out of their envelopes and organize your documentation in some logical order.

Intake/Interview Form Consents
• Explanations and Recommendations •

Note: Giving or withholding consent for any of these forms will not affect the preparation of your return.

Form 1 – **Consent to Disclose Tax Return Information to VITA/TCE Tax Preparation Sites**. Allows information from your previous year tax return to be included in this year's return here *or at any AARP Foundation Tax-Aide or VITA site*. Our recommendation is <**YES**> as this helps ensure that your return is prepared more accurately and efficiently.

Form 2 – **Consent to Disclose/Use Information to AARP Foundation**. The Tax-Aide program relies on funding from multiple sources (government agencies, charitable foundations, etc.) to provide this free tax service. This allows statistical and demographic information from your return—**not your identity or any personal information**—to be used for securing this funding. Our recommendation is <**YES**>.

Form 3 – **Consent for AARP Foundation to Use Select Tax Return information**. AARP Foundation is the non-profit, charitable arm of AARP whose mission is to "serve vulnerable people ages 50 and older by creating and advancing effective solutions that help them secure the essentials: food, housing, income and personal connection." Giving your consent allows AARP Foundation to send you information about its free programs and services—you will not receive solicitations for marketing or paid offers. Depending on your health and financial situation, you may find some of this information useful. It is your decision and we do not have a specific recommendation.

Refund Status

To check the status of your federal refund, go to **www.irs.gov** and click the "Get Your Refund Status" button. You must have the following information to be able to find out your refund status: 1) Social Security Number; 2) Filing Status; 3) Federal refund amount.

To check the status of your state refund, go to **www.revenue.wi.gov** and click the "Where's My Refund?" button. You must have the following information to be able to find out your refund status: 1) Tax Year; 2) Social Security Number; 3) Wisconsin refund amount.

How Does the IRS Contact You?

If you receive a call or voice mail, e-mail or text message from someone claiming to be from the IRS, ignore it. **It is a scam**.

The real IRS only opens communications with a taxpayer via the U.S. Postal Service.

If you receive a letter from the IRS and question its legitimacy, you can call the IRS directly at 800-829-1040, or, if it is during the tax season, bring it to this site during operating hours to have someone look at it with you.

Wisconsin Identity Verification

In an effort to protect taxpayers from identify fraud, the Wisconsin Department of Revenue (DOR) performs a check on randomly selected returns by mailing the taxpayer an Identity Verification letter. **If you receive this letter, do not ignore it**. If you are not sure it is legitimate or need help responding to it, bring the letter to our site during operating hours.

How does the process work? Taxpayers and homestead claimants selected to take an identity quiz will receive an Identity Verification letter asking them to complete the quiz within 20 days. *If you don't complete the quiz within 20 days, your tax return is frozen until documents are sent to the DOR verifying your identity.* The quiz consists of four multiple-choice questions with answers that help the DOR verify that you are really you. If you are the real taxpayer, the questions will be easy to answer.

The quiz can be taken online or by interactive telephone. Once the quiz is complete, taxpayers will know whether or not they passed or failed the quiz. If passed, processing of the refund continues. If a taxpayer fails the first quiz, they will have the opportunity to take a second quiz (different questions from the first). If passed the second time, processing of the refund will continue.

If a taxpayer fails twice or does not complete the quiz within 20 days of receiving the verification letter, the taxpayer must mail documentation to the DOR proving their identity. No refund will be paid until a quiz is passed or the DOR receives proper documentation. In some circumstances, selected taxpayers or claimants will receive only a letter requiring them to send in documents to prove their identity if there is not enough data to produce a quiz for them.

What information will you need to take the quiz? You will need the letter ID from your Identity Verification letter, the last four numbers of your Social Security number (SSN) or individual tax identification number (ITIN), and the Wisconsin refund amount for the Tax Year listed on your letter.