

AARP 2023 Tax Return Preparation Appointments
(All paperwork needed is from the year 2023)

You will not see a Tax Preparer if you fail to provide an ID, Social Security card or statement or ITIN and all the required documents

Se Habla Español

The Indio Senior Center intends these services to be used by low-income seniors

To prevent fraud, you must bring the following to your appointment to see a tax preparer:

- | | |
|--|--|
| <input type="checkbox"/> Social Security card or statement (SSA-1099), OR Individual Taxpayer Identification Notice (ITIN)
<input type="checkbox"/> Valid Government Issued Photo ID: <ul style="list-style-type: none"> ○ <u>Driver's License</u> OR ○ <u>Passport</u> OR ○ <u>Federal / State Government ID with photo</u> | <input type="checkbox"/> Social Security Card or ITIN for every dependent that you wish to claim on your return
<input type="checkbox"/> Spouse (in person) with ID and Social Security card or statement |
|--|--|

Documents to Bring

- | | |
|---|--|
| <input type="checkbox"/> Form 13614-C Filled out to the best of your abilities
<input type="checkbox"/> Last year's tax return – even if we prepared it
<input type="checkbox"/> 1099 R for all pension, annuities, IRA, 401k and other retirement income
<input type="checkbox"/> Social Security Statement SSA-1099
<input type="checkbox"/> W2 from every employer you had in 2022
<input type="checkbox"/> 1099 NEC for all other income
<input type="checkbox"/> Unemployment compensation statements
<input type="checkbox"/> 1099 G for tax refunds
<input type="checkbox"/> W2-G for gambling winnings
<input type="checkbox"/> Brokers Statements for all investment income
<input type="checkbox"/> Interest and dividend statement for all bank accounts | <input type="checkbox"/> Day care provider name, address, and tax ID
<input type="checkbox"/> Form 1095 (A, B or C) if you have healthcare insurance
<input type="checkbox"/> Business expenses
<input type="checkbox"/> 1098 T tuition statement
<input type="checkbox"/> Paperwork for itemized deductions if needed (<i>most taxpayers will not qualify</i>) <ul style="list-style-type: none"> ○ Current and prior year's property tax bills ○ Medical expenses ○ Charitable donation receipts ○ Car registration paperwork ○ 1098 Mortgage Interest statement <input type="checkbox"/> Any other tax related documents |
|---|--|

AARP is prohibited from preparing the following types of returns:

- | | |
|--|--|
| <ul style="list-style-type: none"> • Any state returns besides California • Married filing separately • Rental properties • Complicated Schedule D • Cancellation of home mortgage debt | <ul style="list-style-type: none"> • Farming business • Business with: losses, expenses greater than \$25,00, inventory, depreciation or home office deductions • Forms SS-5, 8606, 8615, SS-8, Parts 4 & 5 on 8962, W-7 • Any return deemed too complicated for preparers |
|--|--|

Please let us know at least 24 hours before your appointment if you need to cancel or reschedule by calling (760) 3391-4170. If you cancel, there is no guarantee you will get another appointment

Staff: _____

Date: _____

Appointment Date: (Mon) (Wed) _____ Appointment Time: _____ (AM) (PM)