

COLLEGEDALE TAX PREPARATION

Thank you for making an appointment for **AARP Tax-Aide** to prepare your 2022 federal income tax return. A specific time has been made for you, so please be prompt. If you find that you cannot make the appointment, please call the Church office so that someone else can be scheduled in your place.

INSTRUCTIONS

1. EVERY ADULT WHO WILL SIGN THE RETURN (Taxpayer and spouse) MUST BE PRESENT
2. Complete one Intake Booklet for each tax return to be filed. Answer “Yes” or “No” questions to the best of your ability; if you don’t understand the question, check the “Unsure” box. We will review this booklet with you upon your arrival and answer any questions you have.
3. BRING WITH YOU TO THE APPOINTMENT:
 - a. IDENTIFICATION
 - i. Social Security card for every person included in the tax return
 - ii. Driver’s License or other government-issued photo-ID for every adult
 - b. BLANK CHECK for direct deposit of a refund or direct debit of balance due.
 - c. Your **2020-** and **2021-**income tax returns.
 - d. LIST OF EXPENSES: mortgage interest; medical and dental expenses, including all medical insurance premiums; charitable donations; property taxes; and sales tax on 2022 car purchases.
 - e. INCOME DOCUMENTATION: This could include tax documents for wages, interest, dividends, capital gains and losses, unemployment compensation, pensions and other retirement income, and/or Social Security benefits.
4. IF IT APPLIES TO YOUR RETURN, BRING THESE THINGS:
 - a. Records of estimated federal income tax payments made during the year.
 - b. A list of all income and expenses related to self-employment, including cash income, tips, car and travel expenses, etc.
 - c. Brokerage statements for sale of stocks or bonds
 - d. Educational expenses – **Form 1098-T**, student’s detailed financial school account and other education expenses, such as books or computer
 - e. **Healthcare Form 1095A** if you have marketplace insurance
 - f. Any other recent IRS or state tax department correspondence

Once the Intake Booklet and your documents are reviewed with you, we will ask you to wait in our lobby until we have prepared your return. When it is complete, we will review the return with you and return all of your documents to you. Once you are in agreement with the return, we will E-File the return with the IRS on your behalf.

COVID-19 PRECAUTIONS: Please wear a mask during the interview process, both to protect yourself and others in the Center from unintentional transmission.

If you have any questions, please call Bill at 423-414-4382.