

FREE TAX PREPARATION AND FILING

Sponsored by AARP Foundation

All taxpayers are welcome with an emphasis on taxpayers aged 60 and over. AARP membership is not required. Services are provided by a volunteer team with over 300 years of professional and volunteer tax preparation experience.

HOW THE PROGRAM WORKS

Appointments are required. No walk-ins will be allowed.

To make an appointment, scan the QR code below with your phone OR go online to **carmelclaylibrary.org/tax-prep**.



These tax preparation sessions are held on Mondays, Wednesdays, and Saturdays from 9am-1pm starting February 3. They take place at the Carmel Clay Public Library's Main Library (425 E Main Street) in Meeting Room B on the library's second floor. For questions about the program, call **317.689.8519**.

Volunteers are IRS certified to prepare most returns but are **not** approved for the following:

- Self-employment if expenses exceed \$35,000, home office, ACA premium, or a net loss
- Rental income, depreciation, or electric vehicle credit
- Income, deductions, or credits outside our scope *(If you are uncertain about the complexity of your tax situation, please call 317.689.8519.)*

As part of the effort to prevent identity theft, the IRS requires volunteers to check the ID of every taxpayer (including spouse for joint returns).

WHAT TO BRING

The following information will be required to complete a tax return:

- Copy of your 2022 tax return (if you are a new client)
- Driver's license, state ID, or passport for taxpayer and spouse
- Social Security cards for taxpayer(s) and dependents
- All tax forms (examples include W-2, 1099-R, 1099-INT, 1099-DIV, 1099-SSA, 1099-G unemployment, 1099-MISC)
- 1095-A for health insurance provided by ACA
- For assets sold—be able to provide original purchase date and cost, sold date, and proceeds
- For self-employed—1099-NEC income, 1099-K credit card income, cash income, plus a tabulated total of expenses
- Federal and state income tax paid
- Dependent care provider information (name, address, employer ID or Social Security number, amount paid)
- 1098-T and book costs for college education credit
- For homeowners—real estate taxes paid in 2023
- For renters—rent paid in 2023, name and address of landlord
- Bank routing and account # for refund deposit