

## TAXAIDE FAQs

Taxpayer MUST BE a New York state resident but can have New Jersey income.

Returns are prepared on a first come, first served basis

Many sites have a sign up sheet available before the library is open

Taxpayers should not make their own sign up list, the only official list is the AARP one

There is a limit on how many returns can be done per day depending on number of counselors and complexity of returns

There is at least one greeter at each site to help fill out required paperwork

Each return is prepared by a counselor and then it is quality reviewed by a second counselor

Taxes are prepared for only those taxpayers present

All returns are e-filed

Taxpayers will have to wait their turn first to have the income tax prepared and second for a quality review of their return. The goal is to keep this process to under 1 and a half hours once the return is started.

Volunteers are not trained on all aspects of taxes. Each year there is a list of out-of-scope forms or components that can not be completed. The Site Coordinator can decide if a return is too complicated or outside the scope of their training and whether the taxpayer must see a professional preparer.

Taxaide will also prepare original or amended returns up to 3 prior years. This can only be done when time is available. It is recommended that this be done in March

Taxpayers must be signed in one hour before closing time.

Please remember that all counselors and personnel are volunteers

## ADDITIONAL SPECIALIZED PROGRAMS

### HOME BOUND ASSISTANCE

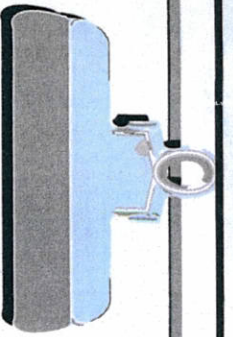
Homebound or special needs seniors can call Iona Northern at Rockland County Office for the Aging: 845-364-2115 for more information or to make an appointment. Volunteers can travel to taxpayer's homes if they are unable to come to the local site.

### FACILITATED SELF ASSISTANCE

FSA offers individuals and families with low to moderate income access to free federal and state tax preparation and filing services online powered this year by TaxSlayer self preparation software. FSA assistance is available at the Community Room of the Nanuet Public Library, Wednesdays between 10-2 during the filing season (February 1 - April 15, 2019). Trained IRS-certified counselors are available to assist you complete your tax returns using on-site computers.

All you need is a valid photo ID and a valid email address to use this service.





## Guide to TaxAide in Rockland County 2019

AARP Tax-Aide, provided in conjunction with the IRS, is the nation's largest free, volunteer-run tax preparation and assistance offered to taxpayers with low and middle income with special attention to those age 60 and older.

The program is run by volunteers. Tax-Aide volunteers are trained to assist taxpayers within the scope of the program.

The tax year 2018 will be especially challenging with tax law changes and new 1040 design.

### FREE INCOME TAX PREPARATION

#### IN ROCKLAND COUNTY SCHEDULE

February 1 through April 15

There are some closed dates at each site.

<u>TOWN</u>	<u>PLACE</u>	<u>DAY AND HOURS</u>
Spring Valley	M.L. King Center	Mondays: 10-2
Spring Valley	Finkelstein Library	Mondays: 10-2
Nyack	Nyack Library	Mondays: 9:15-2
Garnerville	King Daughters Library	Tuesday: 2-6
Suffern	Leo P. Lydon Building	Tuesday: 10-2
New City	New City Library	Tuesday: 10-2
Nanuet	Nanuet Library	Wednesdays: 10-2
Suffern	Suffern Library	Wednesdays: 10-2
Spring Valley	Finkelstein Library	Wednesdays: 3-7
N. Rockland	North Rockland HS	Wednesdays: 2:30-6:30
Garnerville	King Daughters Library	Thursday: 10-2
Pearl River	Pearl River Library	Fridays: 10-2
Valley Cottage	Valley Cottage Library	Fridays: 10-2
Spring Valley	Salvation Army	Saturday: 10-2
New City	New City Library	Saturday: 10-2
Garnerville	King Daughters Library	Saturday: 10:30-2:30
Suffern	Suffern Library	Saturday: 10-2

### WHAT TO BRING

Social Security card(s) for all those listed on return

Picture ID

Driver's license for Taxpayer (and Spouse)

Copy of last year's tax return

W-2 forms from each employer

Unemployment compensation statements

Social Security Received - SSA 1099

All 1099 forms showing interest and/or dividends and documentation showing original purchase price of sold assets

1099 Misc for miscellaneous income

Health Insurance - 1095 A, B, C or other proof of health insurance (still required this year)

All forms indicating federal or state income tax paid

Dependent care provider information

Documentation for itemized deductions

Real estate taxes paid

Tuition forms

Broker statements (1099-B) which usually come later

Any other forms you think are relevant