

## AARP TAX ASSISTANCE at the Avon Lake Public Library

The Lorain County AARP is offering FREE tax counseling and return preparation of Federal, State and Local returns at Avon Lake Public Library. This service is available for senior citizens and low income taxpayers. This electronic filing service, provided by IRS test certified counselors, is offered every Tuesday and Wednesday, beginning February 1 from 9:00 a.m. to 2:00 p.m. through April 15, by appointment only. Call Avon Lake Public Library at 933-8128 to schedule an appointment. AARP membership is not required.

Items in **red** are **REQUIRED** in order for us to do your return.

- **Picture ID for you and your spouse (if married)**
- **Social Security document for you and every person on your tax return.** This can be a Social Security Card, a Medicare Card if the number on the card ends in the letter "A" or a letter from the Social Security Administration with your social security number  
***Note: Form 1099-SSA is not acceptable this year because it does not include the complete Social Security Number.***
- The folder we gave you last year with last year's returns and tax documents (If AARP Tax-Aide did your tax return last year)
- Checkbook if you want to direct deposit any refunds
- All of your current tax year income documents
- W-2 (Wages), all 1095, 1098, and 1099 forms, list of out of pocket medical expenses

Examples of these tax documents:

- 1099-Int (Interest) 1099-Div (Dividends), 1099-R (Pensions), 1099-G (Unemployment and State Refunds), SSA-1099 (Social Security), RRB-1099 Tier 1 & 2, (Railroad Retirement), 1099 B (Brokerage statements),
- Health insurance documents received from the government insurance marketplace, your employer and/or your insurance provider. 1095-A, 1095-B, 1095-C.
- Child dependent care provider information
- 1098-T related to secondary education expenses
- Any other income documents

If you itemize:

- End of year pay stub (with breakdown of deductions, etc.)
- Mortgage interest statement (Form 1098)
- Records of property tax paid
- A list of all out-of-pocket medical expenses including health insurance payments and long term care insurance payments
- A list of charitable contributions