

AARP Tax-Aide for Wayne/Holmes Counties Tax Year 2023

For appointments, call (330) 263-5207 or visit the Wooster Community Center (241 S. Bever St.) after January 8, 2024 (M-F 8:30-4:30) to have your taxes done on a Tuesday or Wednesday between February 6 – April 10, 2024.



would like to welcome you back to our free tax preparation services at the Wooster Community Center. You had your taxes done in recent years with us and unless your situation has changed significantly, we should again be able to do your Federal and Ohio (and if appropriate your school district) income taxes. There are tax situations that we are not allowed to do; these are shown on the back of this letter. This year we will offer two different options for having your taxes completed.

Option 1	Option 2
KEY INFO Only one appointment required. Appointments only offered in the afternoons . Taxes completed on site in one appointment.	KEY INFO Two appointments are required. Appointments only offered in the mornings . Taxes completed over the course of the week and picked up at the second appointment.
Step 1. Call to make one hour long, in-person appointment. Step 2. Once you have made your appointment go to the Community Center to pick up an envelope containing the intake forms that need filled out prior to your arrival at your appointment. Step 3. Arrive to your appointment on time with your filled out intake forms and all your tax forms or communications from the IRS ready to sit down with a tax counselor and complete your 2023 returns.	Step 1. Call to make two appointments, one week apart. Step 2. Once you have made your appointments go to the Community Center to pick up an envelope containing the intake forms that need filled out prior to your arrival at the first appointment. Step 3. Fill out the multi-page Intake form, sign the 14446 form, fill out any relevant worksheets and gather all your tax forms or communications from the IRS. Step 4. Come to the first appointment to have a short interview to go over your filled out intake form . You will leave your envelope of tax materials with us that we will scan and securely store until your second appointment. This appointment will take 10 – 15 minutes. Step 5. Return one week later for your second appointment. At this appointment you will meet with a tax counselor who will go over your printed return, have you sign a form to be able to officially file your taxes and then return all of your tax documents.

For ALL Appointments: Bring a photo ID(s) and Social Security card(s) (Xerox copies okay) for all dependents.

We encourage all individuals to wear masks while interacting with tax preparers. If you are feeling unwell on the day of your appointment please try to reschedule.

We are looking forward to working with you again!

Sincerely,

Your Wooster TaxAide Volunteers

How AARP Foundation Tax-Aide Can Help You Today

We offer free tax return preparation to anyone who needs it. AARP Foundation Tax-Aide volunteers are trained to help you file a variety of income tax forms and schedules.

In certain situations, however, our volunteers may be unable to provide assistance. The Volunteer Protection Act requires that our volunteers stay within the scope of tax law and policies set by the IRS and AARP Foundation. Here's a guide to what our Tax-Aide volunteers can — and can't — do.

We can prepare most returns with:

- Wages, interest, dividends, capital gains/losses, unemployment compensation, pensions and other retirement income, Social Security benefits.
- Self-employment income, with limits.
- Most income reported on Form 1099-MISC. or Form 1099-NEC or form 1099-K
- Schedule K-1 that includes only interest, dividends, capital gains/losses or royalties.
- Charitable cash contributions
- Qualified Business Income deduction.
- Itemized deductions, including noncash contributions to charity that total no more than \$5,000.
- Cancellation of nonbusiness credit card debt.
- IRA contributions — deductible or not.
- Most credits, such as earned income credit, education credits, child/additional child credit and credit for other dependents, child/dependent care credit, premium tax credit, simplified method foreign tax credit and retirement savings credit.
- Repayment of first-time homebuyer credit.
- Estimated tax payments.
- Injured spouse allocation, depending on state.
- Health Savings Accounts (HSA).
- Amendments to filed returns.
- Prior three tax years' returns.

We can't prepare returns with:

- Self-employment if there are employees, losses, expenses that exceed \$35,000, depreciation, business use of home, 1099 filing requirements or other complicating factors.
- Hobby income or other activities not for profit
- Complicated capital gains/losses, such as futures or options.
- Complicated Schedule K-1.
- Rental income, except land-only rentals or rentals of personal residence less than 15 days.*
- Royalty income with expenses if not from self-employment.
- Tax on a Child's Investment and Other Unearned Income (Kiddie Tax).
- Farm income or expenses.
- Moving expenses.*
- Some investment income or itemized deductions that are not included in our training.
- Alternative Minimum Tax, Additional Medicare Tax, or Net Investment Income Tax.
- Foreign financial asset reporting requirements.
- Any virtual currency investment or transaction.

* **Rental or moving:** A volunteer can prepare returns for active duty military personnel only when the preparing volunteer is certified in the military module and another volunteer is certified to review military returns.

AARP Foundation Tax-Aide is offered in conjunction with the IRS.

1-888-227-7669 aarpfoundation.org/taxaide

AARP Foundation®
Tax-Aide