

January 20, 2020

AARP Tax-Aide Dr. Martin Luther King Comm. Ctr.

Free Tax Preparation

Free tax preparation by the AARP Tax-Aide Program will be available in the main first floor room, on Fridays, from 9-12, beginning Feb 7th. This service is open to all taxpayers. You do not have to be an AARP member.

Documents to Bring

- Picture ID
- Previous year tax return (proof of SSN)
- Cancelled check or routing/account numbers for direct deposit of refund
- SSN card for every individual/dependent on first year return
- Identity Protection PIN, if an IRS letter has been received
- Proof of medical coverage, Form 1095-B/C or insurance card,
(Note there is no penalty for not having insurance this year)
- 1095A Form, if insurance purchased from the Health Source RI
- Record of estimated US and State estimated payments made

Income Items

- Wages (W2s)
- Gambling/Lottery winnings (W2G)
- Interest/dividends (1099-INT, 1099-DIV from a bank or credit union)
- Social security (1099-SSA)
- Pensions/annuities (1099-R)
- Brokerage/stock statements (1099-B or equivalent)
- Unemployment (1099G)
- Uber/Lyft Drivers (1099K)
- Other (1099-MISC, self-employment, state/local tax refunds)
- Sch C Business expense items (supplies, insurance, millage logs, utilities, etc.)
- Note: rental properties are generally out of scope , and cannot be prepared

Deduction/Credit Items

- Alimony paid/received...require ex-spouse's name and SSN
- Education (1098-T, school financial statement, receipts)
- Dependent Daycare bills from provider
- Misc. other expenses are generally not allowed since 2018
- 1098-E student loan interest

Schedule A items—total must exceed strd deduction of \$12,200-S. or 24,400-MFJ

- Medical/dental/prescriptions/millage expenses, (totals, not receipts)
- Medical and long term health care insurance premiums
- Mortgage interest and taxes (1098), from bank or CU
- Real estate tax bills, from current and last year
- Large amount personal property taxes (vehicle, boat)
- Charitable donations, cash totals, non-cash proof of donation

Rhode Island Property Tax Credit, 1040H,

Qualifying properties only if city property taxes paid, or rent paid for property on which taxes are paid.

Properties that are 100% government owned (Chapel St, Newport Heights, others) do not qualify.

Age 65 or older, or disabled, 30K maximum income,

Subsidized, HUD Section 8 properties may qualify

Rent receipts for 3 months

City tax bills for current and last year

Proof of disability

All non-taxed sources of income (SSI, gifts, loans, savings)