FREE TAX ASSISTANCE OFFERED

Tax-Aide volunteers offer FREE Income Tax Preparation Assistance to electronically file federal and state income taxes, including the "homestead credit."

The Tax-Aide program, administered through the AARP Foundation in cooperation with IRS, is designed to assist the elderly in preparing their personal income tax returns, but the trained volunteers also help ALL low-to-moderate income individuals, regardless of age. Although there are certain types of tax situations such as rental property, farm or business income that are not covered by the program, the volunteers will be able to assist **most** area residents.

The Fond du Lac Senior Center Tax-Aide site, located at 151 E. First Street, operates each

Tuesday—Thursday 8:30 a.m.—3:45 p.m.
from February 4 through April 10

The program provides federal tax, state tax, and homestead credit assistance. **Appointments for *FREE* tax assistance can be made at the front desk or by calling 322-3630.** Walk-ins will be accommodated as time allows, but *it is strongly recommended that you make an appointment*. One tax return per appointment (if you need two tax returns done, you will need to schedule two appointments).

WHAT TO BRING

You should bring:

- Proof of identity (Photo ID) & Social Security cards for yourself, spouse and any dependents
- A complete copy of 2012 tax returns – if available
- 2013 Wage and Earnings Statements (W-2's), Miscellaneous Income Statements (1099-Misc)
- 2013 Interest Statements (1099-INT) and Dividend Statements (1099-DIV)
- 2013 Mortgage Statements (1098)
- 2013 Pension and Social Security Statements (1099-R & SSA-1099)
- 2013 Tuition Statements (1098-T)
- Receipt of Property taxes actually PAID in 2013 (this may not be what was OWED for 2013)
- Any other sources of income (gambling, small business [under $5000 expenses, no losses], etc)
- Any expenses - such as medical, mortgage interest, charitable contributions and misc. expenses
- For homestead credit, bring rent certificate/s *completed and signed* by landlord **or** your 2013 property tax bill
- Health insurance premiums in addition to Medicare, paid in 2013, for both husband and wife
- If you sold stock in 2013, bring purchase and sale amounts and dates (1099-B). Contact your broker with questions.
- A Record of any federal and state tax estimates paid in 2013
- Your check book (Direct deposit is a fast and secure way to get your refund)
- If possible, both husband and wife should come to the appointment.

PLEASE ARRIVE AT LEAST 15 MINUTES EARLY FOR YOUR TAX AIDE APPOINTMENT!

If you have an appointment and are sick or not feeling well, or can otherwise not make your appointment,
please call to cancel your appointment and reschedule.

ONE TAX RETURN PER APPOINTMENT

The Senior Center will begin scheduling appointments on Monday, January 21, 2014

TO MAKE AN APPOINTMENT, CALL 322-3630.