

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.—3:00 p.m.
from February 1 through April 12

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 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:

A complete copy of 2010 tax returns – if available

2011 Wage Statements (W-2's), Miscellaneous Income Statements (1099-Misc)

2011 Interest Statements (1099-INT) and Dividend Statements (1099-DIV)

2011 Mortgage Statements (1098)

2011 Pension and Social Security Statements (1099-R & SSA-1099)

2011 Tuition Statements (1098-T)

Receipt of Property taxes actually PAID in 2011 (this may not be what was OWED for 2011)

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

All Social Security cards for yourself, your spouse and any dependents

For homestead credit, bring rent certificate/s completed and signed by landlord **or** your 2011 property tax bill

Health insurance premiums in addition to Medicare, paid in 2011, for both husband and wife

If you sold stock in 2011, bring purchase and sale amounts and dates (contact your broker with questions)

A Record of any federal and state tax estimates paid in 2011

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