



**AARP FOUNDATION
TAX-AIDE**

aarp.org/taxaide

1-888-227-7669

What AARP Foundation Tax-Aide can do for you today.

We're here to help low- to moderate-income taxpayers, especially those 50 and older. AARP Foundation Tax-Aide volunteers are trained to assist you in filing certain tax forms and schedules, including the Form 1040. However, the Volunteer Protection

Act requires that our volunteers stay in the scope of the program. If counselors feel they do not have adequate knowledge or your return is too complex, you may need to seek another qualified counselor or paid tax assistance.

We can prepare

- **1040** with Schedules A, B and D
- **Schedule C** if no employees, no inventory, no losses or depreciation or expenses for business use of home, etc.
- **Schedule EIC** and **EIC Worksheets**
- **1099-MISC (box 7)** nonemployee compensation is reported on Schedule C/CEZ)
- **1099-MISC (box 1 or 2)**—rents, royalties, reported on Schedule E with no expenses, depreciation)
- **1099-MISC (box 3)** other income is reported on 1040 Line 21)
- **1040-ES** (Estimated Payments)
- **2441** (Child & Dependent Care)
- **5405** (Repayment of FTHBC)
- **8283**, Section A, Part 1—noncash contributions to charity exceed \$500 but are less than \$5,000
- **8606** (Nondeductible IRA) Part 1
- **8880** (Qualified Savings Credit)
- **8812** (Additional Child Tax Credit)
- **8863** (Education Credits)
- **8949** (Sale or Disposition of Assets)
- **9465** (Installment Agreement)
- **8379** (Injured Spouse)
- **1040X** (Amended Returns, if trained in the tax year being amended)
- **Schedule K-1** that provides information only for interest, dividends and capital gain distributions and royalties (Schedule B, D, E)
- **Cancellation of Mortgage Debt—1099-A** and/or **1099-C** and **Form 982**, if extended, trained and certified*
- **Health Savings Accounts—1099-SA** and **Form 8889**, if trained and certified*

We cannot prepare

- **Schedule C** (Business Profit and Loss) if a loss or if expenses exceed \$25,000
- **Complicated Schedule D** without proper paperwork (Capital Gains and Losses)
- **Schedule E** (Rental Property) with expenses, including depreciation (exception: returns for military members only, prepared by a counselor who has been certified to do military returns provided another military certified counselor is available to quality review the return)
- **Schedule F** (Farm Income)
- **2106** (Employee Business Expenses)
- **3903** (Moving Expenses)
- **8615** (Minor's Investment Income)
- **Portions of Schedules A and B** that are not included in our training
- **Schedule K-1** that involves depreciation or deductible expenses
- **Other rental income** or **business income**

***HSA/COD**: Only counselors who have been certified on one or both of these modules may prepare returns containing HSA and/or COD, respectively.

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