

# 2023 AARP TAX-AIDE PROGRAM

(Tax Year 2022)

## If you need Tax Forms:

- Tax forms can be downloaded via the State of New Jersey and IRS websites.
- Federal forms can also be ordered on the IRS website, to be mailed to your home.
- For assistance, please stop by the Reference Desk at any branch. Printing fees apply for tax forms printed at the library.

Website for State of NJ forms:

[www.state.nj.us/treasury/taxation/gitforms.shtml](http://www.state.nj.us/treasury/taxation/gitforms.shtml)

Website for IRS forms: [www.irs.gov](http://www.irs.gov)

Free income tax preparation service is available at select branches of Monmouth County Library System. A limited number of returns may be prepared each session. Service is provided by trained AARP Foundation Tax-Aide Volunteers for most Federal and NJ tax returns. More complex returns with tax situations on which volunteers are not trained cannot be prepared.

**PLEASE NOTE:** all taxpayers must be present when their tax return is prepared.

If filing a joint return, both taxpayers must be present.

A list of the most common documents that AARP Tax-Aide preparers will need in order to prepare your tax return is shown on the reverse side of this flyer. There may be others if the taxpayer has a unique situation.

To view the most up to date AARP Tax-Aide operating schedule for

**ALL AARP's Monmouth Tax-Aide sites**, please go online to: <https://Tinyurl.com/MonmouthTaxAide>

EASTERN BRANCH SHREWSBURY	MARLBORO BRANCH	WALL TOWNSHIP BRANCH
<p>Wednesday, February 1 through Saturday, April 15</p>	<p>Thursday, February 2 through Thursday, April 13</p>	<p>Friday, February 3 through Friday, April 14</p>
<p>Wednesday from 1 pm to 9 pm Thursday from 9 am to 1 pm Friday from 9 am to 5 pm Saturday from 9 am to 3 pm</p>	<p>Tuesday from 10 am to 6 pm Thursday from 10 am to 6 pm Saturday from 9:30 to 2:30 pm</p>	<p>Monday from 1 pm to 4 pm Tuesday from 1 pm to 4 pm Friday from 1 pm to 4 pm</p>
<p><b>BY APPOINTMENT ONLY.</b> To make an appointment go to: <a href="https://tinyurl.com/TaxAideEasternBranch">https://tinyurl.com/TaxAideEasternBranch</a> <i>Masks are required.</i></p>	<p>No appointment. Walk in, first come, first served.</p>	<p>No appointment. Walk in, first come, first served.</p>

**\*NOTE:** These dates and hours are subject to change. Doors to enter the building will be opened at 9 am, Wall branch opens at 1 pm on Fridays. End times are **CLOSING** times when the last return is expected to be completed, not the time when the last return will be started. Depending on the volume of clients arriving and the number of tax preparers available on any one day, the site coordinator will stop taking new clients when they believe acceptance of additional clients would overrun closing time. This is typically one and a half hours before listed closing time. All the decisions by the site coordinator are final.

[www.MonmouthCountyLib.org](http://www.MonmouthCountyLib.org)

[www.MonmouthCountyLib.org/tax-assistance/](http://www.MonmouthCountyLib.org/tax-assistance/)

The following is a list of the most common documents that AARP Tax-Aide preparers require in order to prepare a tax return. There may be others if the taxpayer has a unique situation.

## IDENTIFICATION DOCUMENTS:

- Social Security Card, Social Security Statement, or other official document from the US Government showing Social Security number and full name. This is required for the taxpayer, spouse (if a joint return) and all dependents. **NOTE:** Medicare cards no longer provide Social Security numbers and are not suitable as proof of ID.
- Driver's license or other government photo ID for the taxpayer and spouse (if a joint return).
- A blank or canceled check (which WILL be returned) to obtain bank routing and account numbers if you are requesting direct deposit of a refund.

## TAX FORMS AND SUPPORTING DOCUMENTS:

- A copy of last year's tax return
- W-2 and the final end of year pay stub from each employer
- Unemployment Compensation Statement (NJ no longer mails this so the taxpayer must print it out online)
- SSA-1099 (Social Security Statement) if receiving Social Security Benefits
- All 1099 forms (1099-INT, 1099-DIV, 1099-B, etc.)
- Brokerage statements which must show the cost basis of any assets sold during the tax year
- 1099-NEC showing non-employee compensation
- 1099-MISC showing miscellaneous income
- 1099-R for any payments from a pension, annuity or retirement account
- All forms relating to federal and state income tax paid including records of estimated tax payments
- Dependent Care Provider information (including EIN or SS# of the provider)
- Supporting records: property tax, mortgage interest, medical expenses, charitable contributions, Homestead Benefit (Rebate), Property Tax Reimbursement (PTR) rebate, etc. If you participate in the NJ PTR program, please bring your PTR "blue book."
- Form 1095-A If health insurance was provided through the NJ Health Insurance Marketplace (GetCoveredNJ) you will need to provide 1095-A. If the taxpayer, spouse, and/or any person who could be claimed as a dependent did not have health insurance for the entire year, month by month details for each such person will be required to determine whether the taxpayer qualifies for any exemption from the Shared Responsibility Payment (NJ "penalty" for not having insurance).