#### Before visiting a Tax-Aide site, please note:

You will need to bring your important documents to the site. The checklist below includes items you need to bring when you visit an AARP Foundation Tax-Aide site for us to help you prepare your tax return(s)

- ✓ Previous year's tax return(s).
- ✓ Social Security cards and/or ITIN notices/cards or other official documentation that show the taxpayer identification numbers for every individual on your return.
- Government-issued photo ID for each taxpayer.
- Checking or savings account information if you want to direct deposit any refund(s) or direct debit any amounts due.
- ✓ Identity Protection PIN (IP PIN) (for each individual if applicable).

### **Income Proofs Required:**

- √ W-2 for each employer.
- √ 1099-G form for unemployment compensation or state/local income tax refunds.
- ✓ SSA-1099 form showing the total Social Security benefits paid to you for the year, or RRB-1099, Tier 1 Railroad Retirement benefits form.
- √ 1099 forms (or other statements) reporting interest (1099-INT), dividends (1099-DIV) and/or proceeds from sales (1099-B), plus documentation showing the original purchase prices if you sold stocks or other assets.
- √ 1099-R form if you received a pension, annuity, or IRA distribution.
- √ 1099-MISC, 1099-K, or other 1099 forms. If you have a business, bring a summary list of all your income (cash and non-cash) and all business-related expenses.
- ✓ Information about any other income of any form including cash or other than cash

If you itemize deductions instead of taking the standard deduction, you will need to bring information showing those deductible expenses.

Federal Tax assistance is available at all locations. State tax assistance is available at all locations in your state for in-state residents, and may be available to out-of-state residents in select neighboring states. Please contact sites in your neighboring state to confirm availability.

Site hours are subject to change on a weekly basis. Therefore, please check again the day before you plan to go to the site. Call 431-3060.

## Save the Dates

# SRC Volunteer Appreciation Luncheon

April 27<sup>th</sup> 11:30 am

If you are one of our esteemed volunteers, be sure to mark your calendars so you can attend.

Fond Memories
Concert Friday, May 1 7:00 pm
Our favorite singing group returns to serenade

## **Job Postings**

SRC is looking for the following:

**Facebook Manager**- We need that famous "someone" to keep our Facebook page up to date. Linda Tingle is no longer able to do this job.

JOY Coordinator/Host- JOY (Just Older Youth) needs a "leader" to act as host and to help confirm speakers. The group meets just once a month (the third Tuesday from Sept.-May.) The Activity Committee and the Pungo-Blackwater Library can help this leader line up speakers.

Newsletter – March 2020 Page 3