Tax Year 2023 TAX-AIDE Tax Assistance !

Free tax returns: **WHERE: Carlsbad Senior Center, 799 Pine Ave**
WHEN: Tues. & Thurs. Feb. 1 to April 11, 2024

Appointments: **PHONE: Carlsbad Senior Center, 442.339.2650**

What We DO and DON"T Do

- We DO serve taxpayers of any age or income level, with a few exceptions.
- We DO taxes for single, divorced, widowed, head of household, and married taxpayers filing jointly. But we DON'T file if you are "married filing separately."
- We DO both federal and California tax returns. But we DON'T file state returns if you lived in another state all or even part of 2023.
- We DO tax returns for most kinds of self-employment. But we DON'T file if you have employees, or equipment that is depreciated, or if you lost money in 2023.
- We DO tax returns with almost all types of income, investments, pensions, tax credits, dependents, and deductions. But we DON'T file if you are active military, or are a landlord, or require a few types of complex situations. If you have questions please stop by the TaxAide Intake Room during open hours (see below).

How It Works

1. **Make an Appointment.** Appointments are available Tuesdays and Thursdays
   Scheduled Appointments: 8:30-11:00 AM and 1:00-3:00 PM
   Walk-in Appointments: 9:00-10:30 AM and 1:30-2:30 PM **if** there are openings
2. **Complete Tax-Aide Intake Form**. Complete **ALL 8 PAGES** of this form **BEFORE** you arrive, or come 15 minutes before your appointment. Get your copy of this form at the Senior Center front desk, or download it from at www.carlsbadca.gov—search for AARP
3. **Bring All Required Information and Tax Documents.** *Use the checklist on the back of this page* to help identify what you need. You may have to make another appointment if you are missing documents.
4. **Start at TAX-AIDE Intake Room** (Follow the signs)**.** A volunteer will review your information, and take you to see a tax preparer. There may be a short wait, but we <u>will</u> see everyone with an appointment. This year, we do not offer a drop-off service.
5. **Sign your Tax Return.** Your tax preparer creates your tax return, and a second tax preparer reviews it. You then approve and sign the final form. **Note**: If you have a spouse, <u>they must be present to sign unless you have a power of attorney.</u> We return all your documents to you, plus a printed copy of your tax return, and file your taxes for you electronically the same day.

Past Taxes: We can file tax returns for the past two years if you never filed them. You must complete a separate 8-page Intake form **for each year**.

What to Bring to Your Tax-Aide Appointment

Essential Information to Bring

- **ID**: Your (and spouse's) unexpired government-photo ID such as driver's license
- **Social Security**: Social security cards for yourself, your spouse, and every dependent you are claiming on your return
- **Prior Tax Return**: Bring your 2022 tax returns, whether prepared by TAX-AIDE or elsewhere. If you didn't file in 2022, bring the most recent return that you filed.

Tax Information to Bring:

The most common tax documents are listed in this checklist. Not all of them will apply to you—and you might have other items not listed. If you aren't sure whether something is needed, bring everything and we can determine what to use.

Income Documents

- W-2 tax forms reporting Wages and Salaries from Employers
- W-2G tax forms reporting Unemployment, gambling winnings, or miscellaneous government income
- SSA-1099 tax forms reporting Social Security income
- 1099-R (retirement) forms showing pensions, IRAs, and other retirement income
- 1099-INT (interest), 1099-DIV (dividends), annual brokerage reports and similar tax forms from banks or investment companies

Deduction Documents and Information (Schedule A)

- Mortgage statement from your lender showing mortgage interest payments
- County property tax statement and DMV vehicle registration statement(s)
- Medical OUT-OF-POCKET expenses for (1) doctors/dentists, (2) hospitals, (3) prescriptions, (4) health and long-term care insurance, and other expenses. Bring **TOTALS** in each category—we don't have time to add up your totals
- Charitable donations: cash/check/credit card, and non-cash (items). **TOTAL** these two categories. If you drive for your charity work, bring a total of charitable miles
- If you pay for care of your dependents, you must have each provider's name, address, telephone number, and Tax ID or Social Security number

Self-Employment Documents and Information (Schedule C)

- Records of everything you earned: cash/check/credit card receipts and 1099 forms
- Records of all business expenses in these categories: advertising, commissions, fees, licenses, business insurance, office expenses, rented space, repairs, supplies, business telephone and internet, training and reference information, equipment and tools, and business travel.
- **TOTAL** each category—we can't provide this service.

Health Insurance

- 1095 Insurance coverage forms