

Taxpayer Information and Responsibilities

Welcome to our AARP Foundation Tax-Aide site. This site is staffed with AARP Foundation Tax-Aide volunteers that have been trained and are certified by the IRS to prepare a range of individual income tax returns. Please take a moment to read the following information which will ensure a smooth process for both you and the volunteers at this site:

- **You are responsible for the accuracy of your return.** You are to ensure the return is complete and accurate before you sign the Form 8879 the volunteer will give you. Our volunteers do not provide legal or financial advice. Our job is to assist you to complete and file your federal return. We are not permitted to provide advice, such as how you can reduce your tax responsibility or handle other financial responsibilities. You may need to consult with a paid tax professional or financial advisor if you have questions that we cannot answer.
- **There are some types of returns that we cannot assist you with.** Some taxpayers have situations that require a tax form that is outside the scope of our program, our training and the IRS certification. Please review the In and Out of Scope list which is available on our Website Services page and on a poster at the site. Additionally, even if the return does fit within the allowable scope of our assistance, a volunteer may need to decline to assist you if your return is beyond the comfort level of their experience. If you have any of those situations, then this site will not be able to prepare your tax return, even if this site has done so in the past. If you have a question about whether your return is out of scope, ask a volunteer so that you do not have an unnecessary wait. **Please do not ask that a volunteer make an exception is your case.**
- **The Client Intake & Information Form must be fully and accurately completed before your return can be started.** Please let us know if you have questions or need assistance completing the form. If you do not have required documentation for an exemption, deduction or tax credit then you will need to return when you have it available for the volunteer to review. All relevant tax records are required to prepare an accurate tax return.

- **If you have a joint return, it will require the signature of both spouses.** If your spouse is not present, he or she will have to come in when possible to sign the Form 8879.
- **Once your return is prepared it will be given a quality review by a second trained and certified volunteer in order to help ensure that it is thorough and accurate.** Although this may require you to have an additional wait, this quality review service is done for your benefit to ensure that you receive the best service that we can provide.
- **You can expect our volunteers to treat you in a courteous and professional manner.** In return, our volunteers expect you to treat them with courtesy as well. Anyone who becomes disruptive will be asked to leave without having his or her return prepared. Failure to comply when requested to leave the site may result in the police being contacted.
- **Feel free to let us know if you have comments, questions or concerns about your return or your experience at this site.** If you need to contact us after this site has closed at the end of the tax season, you can send us an email at villagestaxaide@villagestaxaide.com, or contact AARP at 1-888-687-2277 or 1-800-424-2277. Please do not try to contact any volunteer counselors at their home or outside of this site.

Please remember to bring a copy of your last year's tax return