Free Tax Preparation Services for Low to Middle-Income Persons

AARP Tax-Aide services are provided free of charge to area tax payers, particularly those age 60 and older who would have trouble affording professional services

Reservations can be made by calling 630-257-2522
Lemont Township Administrative Offices, 1115 Warner Ave.
Mondays and Wednesdays from 9:00 a.m.—1:00 p.m.
February 6, 2019 through April 10, 2019

Volunteers can handle relatively uncomplicated individual, joint, and family returns as well as sole proprietor business returns. Please arrive a little early to your scheduled appointment and have all required documentation necessary to file.

Those choosing to use this service are asked to bring all pertinent paperwork – and their spouse, if a joint return – to their scheduled appointment. Among these papers should be the following:

- All 2018 tax forms, including 1099's detailing tax year pension distributions, Social Security income, investments bought and sold (if sold, include date bought and costs) and interest payments received
- 2017 tax year returns and all related documents for that year or prior year tax returns that are in question.
- Official Social Security documents detailing taxpayer identification numbers for themselves and any dependents
- Birth date information for themselves and any dependents
- Picture IDs
- W-2 forms from employers
- Receipts for any donated cash and goods
- Records of out-of-pocket medical expenses and premiums paid for health, supplemental health, and long term disability insurance
- Records related to mortgages and real estate taxes
- Real estate tax statement
- Any other materials documenting types of income received or taxes paid during tax year 2018

Sign Up Today

WHAT TO BRING TO YOUR AARP TAX-AIDE APPOINTMENT

1. **Your last year's tax return and supporting documents and current tax records (and your spouse)**
2. **Social security cards or taxpayer identification cards for self, spouse, dependents whose information will be included on the new tax return**
3. **Picture IDs for self (and spouse)**
4. **A cancelled or blank check showing account routing number so that refund can be direct-deposited or taxes due paid electronically on the date you specify, if so desired**
5. **All information/forms received about potentially taxable income (***Please remove envelopes.***):**
   W-2 (employer's statement of wages paid, etc.)
   Alimony received
   1095 – statement of health insurance coverage from the Affordable Care Marketplace
   1099-B – Tax information statement from brokerage. Also bring records indicating the purchase dates and prices paid for any stocks sold during the tax year.
   1099-DIV – income from dividends
   1099-G -- unemployment compensation
   1099-INT -- interest received
   1099-MISC -- non-employee or home business income
   1099-R -- distribution from annuity, IRA, pension, etc.
   SSA-1099-R -- statement showing Social Security benefits received for the year
   RRB-1099-R -- statement showing Railroad Retirement benefits received for the year
   K-1 -- only a very simple K-1 on trust income can be handled by Tax-Aide volunteers
   Records on sale of property, first-time/existing homebuyer credit
   W-2G (gambling winnings)

7. **All information about potentially tax-deductible factors, including:**
   Children, other dependents living with you (have dates of birth, social security numbers)
   Child and dependent care expenses
   Child support payments according to legal agreement
   Student loan interest paid; statements from colleges showing tuition payments, etc.
   Retirement savings contributions; after-tax pension contributions
   Real estate tax bill showing parcel number(s) for property in Illinois
   Mortgage interest and insurance paid
   Records of estimated tax payments to state, federal
   Documents showing expenses that could total more than your new Standard Deduction:
   -- medical expenses that could total more than 7.5% of gross income, such as
   -- health insurance; long-term care insurance;
   -- totals paid for prescription medications;
   -- out-of-pocket costs for doctors, hospitals, dentists, eye exams and glasses; nursing homes; mileage traveled for medical care
   -- receipts showing cash donations made to charitable organizations, churches, nonprofit schools, hospitals, medical research organizations; unreimbursed charitable mileage
   -- receipts showing the value of materials donated to charitable organizations
   -- gambling losses to the extent of gambling winnings *(deductible only on U.S. return if itemizing on Schedule A)*.

AARP TAX-AIDE SERVICES ARE GEARED PRIMARILY TO PERSONS OVER 60, AS WELL AS TO MIDDLE- AND LOWER-INCOME PEOPLE OF ALL AGES. IT IS NOT NECESSARY TO BE A MEMBER OF AARP