

AVON LIBRARY AARP TAX RETURN PREPARATION SERVICE
Tax Returns for 2011

All appointments will take place at the Simsbury Public Library
725 Hopmeadow Street Room 2 (on the lower level)

FAQs: Answers to Frequently Asked Questions

Q. Who is eligible for this free service?

A. The AARP tax aide service is designed for lower-income people with simple returns. It is available to all income levels...but simple returns only. Tax volunteers may refuse to complete a tax return for any reason. Returns may not include real estate rental or trust income, other than some K trusts. No foreign income. Military income of wages only. No housing or travel expenses. Schedule D and one page of Schedule D1 only. Day traders should see a tax accountant. No hand-written or memorized tax data allowed.

Q. Only SIMPLE Self-employment. What is simple self-employment?

A. This is a one-person service business that is eligible for Schedule C-EZ. This means no employees, inventory, depreciation, home office expenses, or loss. Expenses must be under \$10,000. You must provide written documentation of income and expenses, or we will not do your return.

Q. When is this service provided?

A. There are two volunteers available on each Saturday from February 11 to April 14, and two volunteers on each Wednesday from February 8 to April 11. Appointments are 1 hour in length and are scheduled for 10:00, 11:00, 12:00, and 1:00 on Saturdays and 1:30, 2:30, and 3:30 on Wednesdays.

Q. How do I make an appointment?

A. Call the library at (860) 673-9712 and ask for the Reference Desk.

Q. Do I have to live in Avon to get this service?

A. No.

Q. What if I don't want a return prepared but just want a question answered or my own calculations reviewed?

A. If you have a simple question that can be answered in five minutes or less, just come in during the appointment days and see if a volunteer can answer it between appointments. For more complicated questions or calculation reviews, make an appointment.

Q. When should I arrive for my appointment?

A. People with appointments at 10:00 should arrive as soon as the library opens at 10:00. People with appointments at other times should arrive 10 minutes before their appointment time in order to fill out an Intake Sheet, which will be used to prepare the return. Walk-ins are discouraged.

- Q., What do I do if I can't keep my appointment?
A. Call the library and cancel it, preferably 24 hours or more before the scheduled time.
- Q. What happens if I don't call to cancel and don't show up?
A. You will not be permitted to make another appointment this year.
- Q. What if I am running a little late?
A. We will wait up to 10 minutes past the scheduled appointment time for you to arrive. After that time, the volunteer may take another taxpayer in your place and you will have to make a new appointment. If the volunteer is still available, he will start your return, but, if it cannot be completed before the next scheduled appointment, you will have to return another time to finish it.
- Q. What if my return takes longer than an hour to do?
A. Usually this is because the taxpayer has not organized his or her papers or does not have needed information readily available. You will have to return another time to finish it.
- Q. Can I ask for a particular volunteer?
A. Yes, but be aware that that person may not be present on the day you want.
- Q. What information do I need to bring with me?
A. You must bring ALL of the following:
All Social Security cards, last year's federal and state returns, all W-2, 1099 and other tax information,
end-of-year investment income statements, stimulus payment information, property tax statements,
Schedule A medical and dental costs, real estate tax payments, contribution and other information.
- Q. How many people can come to a single appointment?
A. One tax return per hour, unless two people have two, separate 1040-EZ returns to be completed at the same time.
- Q. Will my return be electronically filed?
A. We have two computers. All returns will be electronically filed.
- Q. What does electronic filing involve?
A. We prepare your return on the computer. After you have reviewed it on the screen, we print a copy for you and then electronically transmit the returns to both the IRS and to Connecticut. If you owe money, we provide you with a payment voucher to send in with your check (you must provide your own envelope for the Federal payment). You will sign a form 8879 that we will send to the IRS in April with copies of your W-2's, 1099's, and 1098's. If you are filing a joint return, both people must sign this form before your return can be transmitted.
- Q. How will the privacy of my information be protected?
A. We comply with Federal requirements for privacy. Ask the volunteers for details.
- Q. Will the volunteers be available after April 15 to help with IRS questions or other reasons?
A. No. You will need to work with the IRS directly or hire a paid preparer to help you.