

# **AARP TAX ASSISTANCE**

AARP volunteers will offer tax assistance to older adults, who are Wisconsin residents. AARP's focus is on persons 60+, persons with disabilities or low income. Tax Assistances will be by appointment only. NO walk-in assistance will be available. **We will start taking calls for appointments January 9, 2023.** Taxes will be completed in person. Masks are optional this year.

There is a security and screening station upon entering the building in Hudson. Please be prepared to go through a metal detector and to have all your belongings screened. Please allow for extra time.

**PLEASE CALL:**  
**ST. CROIX AARP TAX ASSISTANCE PHONE LINE TO ARRANGE AN APPOINTMENT.**  
**(715) 391-9220**

**YOU MUST HAVE A SCHEDULED APPOINTMENT TO ATTEND.**  
**TAX INFORMATION PACKETS MUST BE COMPLETED PRIOR TO ARRIVAL. PACKETS WILL BE MAILED OUT IN ADVANCE.**

## **2022 LOCATIONS:**

<b>St. Croix County Government Center</b>	<b>Agriculture and Education Center</b>	<b>River Falls Public Library</b>
1101 Carmichael Road, Hudson WI 54016 Rm #1216	1960 8th Ave. Baldwin, WI 54002	140 Union St, River Falls WI 54022

### **Please Bring the Following with You when You Come**

- Government issued i.d. (Current Driver's License OR State of Wisconsin ID)
- Last year's tax return
- Social Security cards or other official documentation for yourself and all dependents
- Checkbook or pre-printed direct deposit info showing routing number if you want to do a direct deposit of refunds
- W-2 from each employer
- SSA-1099 for Social Security benefits paid to you or RRB-1099 for Railroad Retirement benefits
- 1099 forms reporting interest(1099-INT), dividends (1099-DIV), proceeds from sales (1099-B), as well as documentation showing the original purchase price of your sold assets
- 1099-R form if you received a pension or annuity, especially if a portion was withheld for income tax purposes
- 1099-MISC for showing any misc. income/Unemployment Compensation statements
- Documentation for all federal and state income tax paid
- Homestead or Rent Credit documentation such as a signed rent certificate and/or property tax bills for past year
- Affordable Care Act-If you purchased health insurance through the marketplace, please bring the 1095A form showing dollar amounts, whether SRP is owed, or exemption given.
- All other 1099 forms, with letter following 1099 i.e., NEC, K, G

### **If You Are Itemizing:**

- 1098 form showing home mortgage interest
- Proof of payment for medical/dental expenses (including Dr. and Hospital bills, medical insurance premiums) receipts for prescription meds, costs of assisted living services, bills for home improvements
- Receipts of cancelled checks for all income, property taxes paid and record of tax refunds
- Dependent care provider information (name, employer ID or Social Security Number)
- Receipts, cancelled checks or 1099 forms related to continuing education