

## AARP Tax-Aide for Tax year 2023 Taxpayer Instructions and Checklist

Last Name: \_\_\_\_\_ First Initial: \_\_\_\_\_ Phone # (\_\_\_\_\_) \_\_\_\_\_

Bring list Checklist and of the following documents or information for Your Tax Preparations

1. **Complete Form 13614-C; the Intake Booklet.** Be sure to answer ALL questions on ALL pages except for the gray box in the lower right corner of Page 1, and PLEASE PRINT
2. **Photo Identification** for Tax Payer and Spouse. (i.e. Driver's license, State ID Card, Passport, Military. Student of other form of government identification)
3. **Social Security Cards** for everyone listed on the tax return. (only exception: providing a complete copy of 2022 tax return which was prepared and e-filed by either Tax-Aide or a local professional tax service or accountant). However, if you have a dependent or qualifying relative for 2023, then a Social Security Card must be provided for that individual.
4. **Copy of you 2022 Tax Return.** Or the most recent prior year's return you have.
5. **Banking Information.** If you checked "yes" for No. 3 and No. 4 on Page 3 of the Intake Booklet, a copy of your bank check (not a deposit slip) for routing and account information.
6. **Tax Forms for 2023.** For every source of income (or expenses) listed on Page 2 of your Intake Booklet all corresponding Tax Forms. The most common forms are W-2 wage statements, 1099s for Social Security, retirement, IRAs, bank interest, dividends or sales of securities.
7. **Marketplace Insurance.** Form 1095-A if you participated in a health insurance plan under the Affordable Care Act. Provide Forms 1095-B or 1095-C if they were issued to you.
8. **Health Savings Accounts.** Form 5498-SA, if available. Form 1099-SA if you had distributions from your Health Savings Account.
9. If you **Itemize Deductions** of Schedule A rather than taking the **Standard Deduction**, fill out all of the information listed on Page 2, Part IV, No. 4 of the Intake Booklet.
10. **Rhode Island Housing Credit.** If you are eligible for this rental and/or property tax credit, please complete the reverse side of this form.

FOR Rhode Island (RI) Housing Credit Only:

You must answer "YES" to the following **FOUR QUESTIONS** in order to qualify:

1. I lived in Rhode Island in all of 2023 and gross income was less than \$37,870.
  2. I lived in a property for which I pay rent or local property taxes.
  3. My rent or property tax is paid up-to-date.
  4. I was born before December 31, 1958 OR I am permanently disabled and receiving SSI Disability Benefits.
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How many persons live in your household? \_\_\_\_\_ How many are dependents under age of 18?  
\_\_\_\_\_

Total of any and all annual non-taxable income for all household members: SSI Disability benefits: \$ \_\_\_\_\_  
VA benefits: \$ \_\_\_\_\_ Gifts: \$ \_\_\_\_\_  
Other: \$ \_\_\_\_\_ (do not include heating or assistance payments)

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If a Homeowner (including mobile homes):

Amount of 2023 real estate taxes you paid \$ \_\_\_\_\_ Amount of 2023 land lease \$ \_\_\_\_\_ (if applicable)

If a Renter:

Name of Landlord: \_\_\_\_\_

Address of Landlord: \_\_\_\_\_

Telephone # of Landlord: (\_\_\_\_\_) \_\_\_\_\_

Include Area Code

Annual amount of rent you paid in 2023: \$ \_\_\_\_\_

For Newport County Residents:

These are the residences that DO NOT qualify:

- Newport Housing Authority
- Park Holm
- Other entities within the North End
- Donovan Manor (Chapel High Rise)
- Chapel Terrace residences
- McKinney Shelter

- row of houses out by Morton Park
- row of houses in back of MLK CC

These are the residences that DO qualify:

- 14 West Broadway (High Rise)
- Properties paying rent to Phoenix Properties
- Festival Field
- properties coming under Church Community Housing

There are other residences that do or do not qualify