

FIRST: MAKE AN APPOINTMENT WITH RUFTY-HOLMES SENIOR CENTER TO HAVE YOUR TAXES PREPARED. CALL 704-216-7714

SECOND: FOLLOW THE INSTRUCTIONS BELOW

This packet contains the following items:

1. Intake/Interview & Quality Review Sheet (**Intake Booklet**)
2. **“What to Bring to Have Your Tax Return Prepared”**

Before you come for your appointment, fill out the **Intake Booklet**, pages 1-4, including the information for everyone you will claim on your tax return. (both taxpayer and spouse must sign the tax return if filing jointly).

Before you come for your appointment, review **“What to Bring to Have Your Tax Return Prepared.”** Be sure to bring all the documents listed on this sheet that you have. **Note the first paragraph** on this sheet that tells you **what returns we cannot process**. Our volunteers are certified by IRS to handle most returns, but we are not trained and certified for those returns containing the listed items.

If needed, the tax package can be downloaded from the Rufty-Holmes website:
RuftyHolmes.org

Bring to your appointment:

1. The completed **Intake Booklet**
2. **The printed copy of last year’s tax return (2021, both federal and state). If we filed your return for 2021, bring the large envelope with all contents.**
3. The **documents needed** to prepare your return (W-2’s, SSA-1099’s, 1099’s, 1095-A, 1098’s, etc.)
4. **Your ID** (driver’s license or other government issued identity card) for yourself and spouse if filing jointly
5. All **Social Security cards** for those to be claimed on your return (spouse, dependents). If you have the SSA-1099 forms, that will be acceptable if you do not have your Social Security cards.
6. If filing jointly, both spouses must come to the appointment.
7. If filing for another person, you must have a power of attorney that authorizes you to file tax returns for that person. You must bring that power of attorney with you.

If you are experiencing any symptoms of illness (COVID, flu, or others), please call the Rufty-Holmes Senior Center (704-216-7714) to reschedule your appointment. Please, DO NOT come in sick.