AARP Foundation Tax-Aide

Bond County Senior Citizens’ Center

**Online Packet Contents List**

1. **Online Packet Contents List – Please note that SOME items are REQUIRED and some should be used only if they apply to your specific taxpayer situation.**
2. **REQUIRED READING -- 2022 COVID Notice for Onsite Service**
3. **REQUIRED READING – How Your Return Will Be Prepared –** explains the process the Tax-Aide volunteers will follow to prepare your return.
4. **REQUIRED READING –** **Explanation of Form** **1446 --**  This document will prepare you to complete Form 1446, which indicates your understanding of the Tax-Aide requirements.
5. **REQUIRED COMPLETION – BONDCo Dropoff Form 1446 –** must be completed signed as indicated by taxpayer (and spouse if Married Filing Jointly). See #4 for explanation.
6. **REQUIRED COMPLETION – TY21 Tax-Aide Intake Booklet – all pages** must be completed and signed as indicated by taxpayer (and spouse if Married Filing Jointly) – All boxes should be addressed: Yes, No, or Unsure. Please note that you may use the “Fillable” document which can be downloaded and filled out on your computer and then printed, OR you may download the non-fillable document, print it, and fill it out. Either electronic or regular signatures are acceptable.
7. **REQUIRED READING -- Documents We Need –** Please review list of 36 items carefully to ensure that you bring with you ALL the materials that will be required for volunteers to prepare your tax return. Please be sure to bring BOTH your 2019 and 2020 tax return packets with you to your drop-off appointment.
8. **REQUIRED COMPLETION – TAX DOCUMENTS – DocumentsInventoryFederalAndIllinois –** Please fill out both Federal and Illinois inventory checklists.
9. **OPTIONAL – Please complete if needed. 2021 Self-Employed Sch C Worksheet** to be used if you have income from a small business you own or from a “side” job.
10. **OPTIONAL – Please complete if needed. 2021 Self-Employed COVID Worksheet** to be used if you lost self-employment income due to COVID.
11. **OPTIONAL – Please complete if needed. 2021 Itemized Deductions Worksheet** to be used if you plan to itemize. Note that most Tax-Aide clients find the standard deduction to be better than itemizing.
12. **OPTIONAL – Please complete if needed. 2021 Education Credits Worksheet** to be used to get credit for a full-time college student’s expenses or part-time adult education expenses.