



FREE PROGRAM MAKES FILING RETURNS LESS TAXING

By Toni Garrard Clay

For years, Cliff and Jo Ann Victry did their own taxes. Then they began to use a free tax preparation service provided by the AARP Foundation called Tax-Aide. Still, just to be on the safe side, Mr. Victry continued to work up his own taxes before taking them to be prepared by a Tax-Aide volunteer.

“Well, they saved us money one year because they knew to claim something that we didn’t know about,” said Mrs. Victry. “After that, we figured we wouldn’t try to do it ourselves anymore. We were just testing them to make sure they did it right. Then we found out they’re smarter about taxes than we are.”

According to the AARP Foundation, about 50 percent of the adult population in the United States lack the skills to prepare their own tax returns, and as much as 25 percent of low-income workers don’t claim their Earned Income Tax Credit. The Tax-Aide program, which is completely free of charge and operates in conjunction with the IRS, was started to help low- to moderate-income taxpayers prepare their tax returns. But the service is not limited to people of any particular income bracket.

“Everyone is eligible unless their return is beyond the scope of the program,” said Gil Betts, the district coordinator for AARP Tax-Aide, as well as an instructor and technology coordinator. “The only people we turn away are people trying to cheat, who

try to tell us how to prepare a return or whose return is just too complicated.”

As examples of “too complicated,” Betts lists returns involving many stock transactions, bankruptcy, a health savings account or someone who is married, but filing separately.

Betts, a resident of Trinidad and former government accountant, said he retired early and was looking for something to do when he started working as a Tax-Aide counselor in 1995.

“There’s a great deal of satisfaction in helping people at no charge accomplish something that can otherwise be traumatic for them,” he said. “This is one of my volunteer loves.”

Tax-Aide is funded by donations and the IRS, which imposes the requirements for volunteer training and certification. “We have a 100-percent quality review standard,” said Betts. “When a volunteer completes a return, it is then reviewed by a second volunteer to ensure quality.”

Speaking of volunteers, Betts said more are always needed. The typical tax preparer is someone knowledgeable about taxes, of course, as well as being computer literate and willing and able to learn the tax laws and standards of conduct and take the

qualifying exam. But, if preparing taxes is not one's cup of tea, there is also a need for greeters as well as someone to handle the technological side of the program. "I'd like someone to take over my role as the district technology coordinator," said Betts.


In Henderson County, Tax-Aide volunteers operate one day a week at three separate locations (see sidebar).

Appointments may not be made. Rather, services are offered on a first-come, first-served basis. Volunteers are generally busiest early in the morning. The program will run February 4 until April 15.

Taxpayers who file joint returns should both come to the site unless a filer is physically unable to do so. Bring the following: a copy of the previous year's return; all income documents for 2012, such as W-2's or any 1099s; all documents needed for any itemized deductions; and Social Security cards for each taxpayer and dependent.



"This is a great program," said Mrs. Victry. "There's no catch. ... There are a lot of people who can't do their own taxes, and they aren't well-off enough to hire someone to do it for them. If this weren't available, I don't know what they'd do."

To learn more about becoming a Tax-Aide volunteer, visit www.aarp.org/taxaide 



AARP Tax-Aide Locations & Hours*

Library at Cedar Creek Lake, Seven Points

410 East Cedar Creek Parkway
(Hwy 334, east of the traffic light)
Monday, 8am-Noon

Malakoff Senior Center

503 North Terry Street
(Hwy 198, north of the traffic light)
Wednesday, 8am-Noon

TVCC Liberal Arts Building, Athens

Located off Lakeside Drive,
east of the gym
Friday, 8:30am-12:30pm

* Service available Feb. 4-April 15

