



Ellington Senior Center COVID Protocol

The Senior Center is closed to the public . Masks are required at all times when in the Ellington Senior Center parking lot handing your tax documents to an AARP volunteer.

Tax Return Completion Process

In order to complete your tax return in as safe a manner as possible, the process that will be followed will be different than that which was used in previous years. When you arrive at the Senior Center, proceed to the designated area marked by orange cones ***no sooner than 5 minutes prior to your appointment time.*** You will meet with a tax preparer at your car for a very brief period of time to make sure your paperwork is in order. We will need your cell phone number. Once the return is complete, you will meet with the tax preparer at your car for another brief period of time to review and sign the return. If this is a joint return, both spouses are expected to attend the appointment.

Cancellations:

In the event of inclement weather, if the Ellington public schools are closed or delayed due to snow, so is the Senior Center. If you have any questions, please call the Senior Center at 860-870-3133.

If you are unable to make your appointment, please call the Senior Center to cancel it so that we may offer your time slot to someone on the waiting list.

What To Bring With You

Included with this letter is an IRS “Intake and Interview Form”. Please complete this form before your appointment and bring it with you. You may not be able to answer all the questions on the form; do so to the best of your ability. ***Your return will not be able to be completed if you do not have this form with you.***

In addition to the “Intake and Interview Form”, please bring the items listed below. This list covers the vast majority of items that are typically seen through the TaxAide program, but not all. If you have other items that you believe should be incorporated in your tax return, please bring them as well so a tax preparer can review them and determine if they are needed. All items should be removed from their envelopes and extraneous papers separated out.

- Photo identification
- Proof of Social Security numbers (SS cards or SS earnings statements) for everyone on the tax return
- W-2s from employment
- 1099Rs from pensions, IRAs, 401(k)s, etc.
- SSA-1099Rs from Social Security
- 1099-Gs for unemployment compensation
- 1099-DIV/1099-INT for dividends and interest
- Tax statements from your brokerage company
- 1099-Misc for miscellaneous income
- Charitable contributions
- Education expenses, including student loan interest
- Child care expenses
- Income/expenses from self-employment
- Form 1095-A if you received health insurance through Access Health CT
- Medical expenses (insurance premiums, doctors’ bills, prescription charges, expenses for glasses and other medical equipment)
- State and local taxes (state income tax, property tax)
- Home mortgage interest
- Amount of stimulus payment received (both in spring 2020 and December 2020/January 2021) if you believe you did not receive the full amount to which you were entitled
- Checkbook or checking/savings account information if you wish to receive your refund via direct deposit
- Your 2019 federal and state tax returns (2018 if 2019 not completed)