

COUNCIL ON AGING OF MARSHALL COUNTY

1305 West Harrison Street
Plymouth, IN 46563
(574) 936-9904
[view map](#)

Marshall County
1 mile from you

TAX PREPARATION ASSISTANCE

AARP

Description: Provides free electronic income tax filing for eligible taxpayers. Trained volunteers prepare basic federal and Indiana state returns for taxpayers ages 60 and older and/or those with low to moderate income in 2016. Volunteers at these sites will be able to help filers claim appropriate deductions and credits, including the Earned Income Tax Credit.

Hours: Feb 14-April 13, 2017

Office: Mon-Fri 7:30am-5pm ET

Appointments: Vary

Eligibility: * Ages 60 and older -OR- low/moderate income (priority is given to seniors)

* Filing basic federal and Indiana state income tax returns; volunteers will NOT be able to assist taxpayers who had the following situations in 2016:

- Owned or sold rental property
- Sold a business
- Had more than \$10,000 in business expenses
- Bought or sold stocks, bonds, or mutual funds

Intake procedure: Call to make an appointment.

What to bring: * Valid photo ID

- * Social Security cards or ITIN cards for all persons on the return
- * Copy of last year's tax return (not required, but helpful)
- * W2 forms for all employment during 2016
- * All 1099 forms received (including from bank, pension, Social Security, etc.)
- * Any 1095 form received from the Health Insurance Marketplace
- * Any education expense receipts and 1098 form (if applicable)
- * All child care receipts with provider's address and Social Security number/employer ID number
- * Real estate property tax receipt (if applicable)
- * Landlord's name, address, and amount of rent paid in 2016 (if applicable)
- * Bank routing number and account number for direct deposit

Fees: None

Services: Tax Preparation Assistance

Accessibility: Wheelchair accessible

Public transportation available

On-site parking