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**AARP Tax-Aide Sonoma County 2024 Fact Sheet**

**FREE Income Tax Return Service in Sonoma County**

**About AARP Tax-Aide**

AARP Tax-Aide is a 100% free service funded by the AARP Foundation and the IRS, whose focus is on low and moderate-income seniors and those who may not be able to afford a paid tax preparer and cannot do their own taxes. Taxpayers do not need to be an AARP member to use this service (and will not be asked about membership), and there is no age or income limit.

For Tax-Aide in Sonoma County, counselors and client facilitators are all trained volunteers who live in the county. Service is available at ten sites throughout Sonoma County, between February 1 and April 15. In addition, off-season tax preparation is offered from May through October at the Franklin Park Clubhouse site in Santa Rosa.

**Types of tax returns that can be prepared**

AARP Tax-Aide counselors are trained to handle the most common tax returns - those involving wage income, investment income, pensions and IRA distributions, unemployment, Social Security, and self-employment income. Counselors can prepare returns involving itemized deductions (Schedule A) as well as those with the standard deduction.

For more complicated tax situations, the IRS has limited the scope of the program. Common reasons for having to being unable to help taxpayers include:

* Rental income
* Complex Schedule K-1s
* Being a resident of California for only part of the tax year (exception: dependents)
* Purchased a solar power system and want to claim the tax credit
* Bought an electric vehicle and want to claim the tax credit
* Have a business with a net loss, or with expenses totaling over $35,000

**New locations and additional capacity for 2024**

For the 2024 tax season, an increase in Tax-Aide volunteers has led to more days of service at several locations. Our Franklin Park Clubhouse site is now open either four or five days each week. Our Rincon Valley and Sonoma Valley locations are now open every week. Petaluma now has two locations, with the addition of four days at the Petaluma Library.

In 2023 we filed more than 2,100 federal and state income tax returns for Sonoma County taxpayers - a 40% increase from the prior year. With our additional capacity this year, we hope to see similar growth for 2024.

**How AARP Tax-Aide Works**

A typical tax return takes between one and two hours, from the review of taxpayer documents, to giving the taxpayer a file copy of the return. The process includes a double check by a second counselor to ensure an accurate and quality product. Tax returns are e-filed whenever possible. If a return cannot be e-filed, the taxpayer is given a copy and instructions on how to file by mail.

All service by AARP Tax-Aide is by appointment only. Appointments can be made by text, phone and - for the Rincon Valley Regional Library site - online. Details and phone numbers for each site can be found on our 2024 schedule and on aarp.com (the AARP location finder will be available in mid-January).

If a taxpayer has questions about our service or whether we can handle their specific situation, our district phone number is 707-327-2401.

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