

# **Tax Help at the Library**

## **Make an Appointment for Free Tax Assistance**

AARP Foundation Tax-Aide and VITA tax assistance, in cooperation with the IRS, NC Department of Revenue, Buncombe County Library System and Council on Aging, Inc. will offer free tax preparations for taxpayers of low and moderate income, with special attention to those age 60 and older.

You will **need an appointment** to speak with a tax help aide. At your appointment, you can drop off your tax documents and you'll be given another appointment in about 2 weeks to pick up your paperwork and completed tax form.

### **HOW IT WORKS**

1. Pick-up a tax record envelope and instructions at Black Mountain, East Asheville, Enka-Candler, West Asheville, Weaverville or Pack Library during library hours.
2. Complete the Intake/Interview Booklet in your envelope by answering all questions. Then sign and date the form. Place all your tax forms and any information relating to your tax return in your envelope.
3. **Make an appointment** to drop-off your Tax Record Envelope and meet with a Tax-Aide volunteer.

### **SCHEDULE & APPOINTMENTS**

#### **Black Mountain Library**

Mondays and Thursdays, appointments available between 9am-5pm

To make an appointment, either email [NCTVhelper@gmail.com](mailto:NCTVhelper@gmail.com) with your name and telephone number, or call (828) 669-8610 between 1:30 and 4:30 pm Monday – Friday. An AARP volunteer will contact you to set up your appointment. You can pick up a tax packet at the Black Mountain library. At your appointment, a tax volunteer will check all documents and give you a follow-up appointment to pick up your completed tax return and documents.

#### **Pack Memorial Library**

Wednesdays, appointments available between 10am-4pm

To make an appointment for Wednesday tax help at Pack Library, email [packtaxes@gmail.com](mailto:packtaxes@gmail.com) with your name and phone number and desired appointment date and time. An AARP volunteer will contact you to set up your appointment. If you don't have access to email, the staff at the library can email AARP for you. You can pick up your tax packet at the library. At your appointment a tax volunteer will check all documents and give you a follow-up appointment to pick up your completed tax return and documents.

Saturdays, appointments available between 10:30am and 2pm

To make an appointment for Saturday tax help at Pack Library, email [vitatax.unca@gmail.com](mailto:vitatax.unca@gmail.com). At your appointment, a tax volunteer will check all documents and give you a follow-up appointment to pick up your completed tax return and documents. This tax help is provided by UNCA.

#### **Weaverville Library and Weaverville First Baptist Church**

Thursdays, appointments available between 9am-12:30pm

To make an appointment for tax help at the Weaverville First Baptist Church email [aarptaxesweaverville@gmail.com](mailto:aarptaxesweaverville@gmail.com) with your name and telephone number OR call the Weaverville Library at 828-250-6482 with questions. If you don't have access to email, the staff at the library can email AARP for you. An AARP volunteer will contact you to set up your appointment at the Weaverville First Baptist Church. You can pick up your tax packet at the library. At your appointment, a tax

volunteer will check all documents and give you a follow-up appointment to pick up your completed tax return and documents.

### **West Asheville Library**

Tuesdays, appointments available between 8:30am-5:30pm

To make an appointment for tax help email [aarptaxeswestasheville@gmail.com](mailto:aarptaxeswestasheville@gmail.com) with your name and telephone number. An AARP volunteer will contact you to set up your appointment. If you don't have access to email, the staff at the West Asheville library can email AARP for you. You can pick up your tax packet at the library. At your appointment, a tax volunteer will check all documents and give you a follow-up appointment to pick up your completed tax return and documents in 1 or 2 weeks.

Tax help will start February 1 and end April 14.

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**Bring the following documents and tax forms to your tax help appointment.** Photocopies are recommended:

#### **ID:**

- Photo ID / Driver License for Taxpayer and Spouse
- Social Security Cards for Taxpayer, Spouse and **ALL** dependents
- Prior year (2024) Federal and State tax returns
- Voided check for **direct deposit** of any refund to your checking / savings account
- Letter from the IRS if they issued you a 6-digit identity protection PIN for security reasons.

#### **Tax documents can include:**

- W-2 (Wages), W-2G (Gambling winnings)
- SSA-1099 (Social Security Benefit Statement)
- 1099-R (Retirement), 1099-RRB (Railroad Retirement Benefits)
- 1099-Interest, 1099-Dividend, 1099-OID
- 1099-B (Brokerage Statement, Sale of Stocks, Bonds and Mutual Funds), 1099-Ks ###
- 1099-G (Unemployment Benefits, State refunds)
- 1099-NEC (Self-Employment), 1099-MISC, **PLUS** itemized list of expenses
- 1099-S (Sale of Home), 1099-C (Forgiveness of Credit Card Debt)
- 1099-T (Education Credits) **PLUS** Student Account Statement, 1098-E (Student Loan Interest)
- 1099-SA and/or 5498-SA (HSA = Health Savings Account) **PLUS** itemized list of medical expenses
- 1095-A (Health Insurance – Affordable Care Act, Health Insurance Marketplace)
- Schedule K-1 (Form 1065) (Limited to Interest and Dividend)
- Itemized list of expenses if you are not using Standard Deductions.

**IMPORTANT** – Because of limited availability of volunteers, space, and time, we will only be able to prepare tax returns which have fewer than 12 tax forms and one 1099-B (Brokerage Statement).