

RSVP/AARP TAX-AIDE PROGRAM

- Free tax preparation assistance by trained volunteers for low-to-moderate income Montgomery County taxpayers (special attention to SENIORS age 60+)
- By appointment only (book by 3/1 to guarantee availability!)
- Schedule online at www.montgomeryserves.org
- Or, call 240-777-2577 (Monday - Friday, 9:30am - 3:30pm) for an appointment
- Transportation questions? Call 311 within Montgomery County for assistance

BETHESDA

Davis Library
6400 Democracy Blvd 20817
Mondays by appointment
Bus: 47, J2, J3

DAMASCUS

Damascus Library
9701 Main Street 20872
Wednesdays by appointment
Bus: 90

Damascus Senior Center
9701 Main Street 20872
Fridays by appointment
Bus: 90

GAITHERSBURG

Gaithersburg Library
18330 Mont. Village Avenue
20879
Tues evenings by appointment
Wednesdays by appointment
Bus: 55, 56, 58, 59

GERMANTOWN

Germantown Library
19840 Century Blvd 20874
Mondays by appointment
Bus: 97, 98

KENSINGTON

Kensington Park Library
4201 Knowles Avenue 20895
Fridays by appointment
Bus: L8, 5, 6, 34



OLNEY

Olney Library
3500 Olney-Laytonsville Road
20832
Thursdays by appointment
Bus: 55

POOLESVILLE

Poolesville Memorial UMC
17821 Elgin Road 20837
Fridays by appointment
Bus: 76

ROCKVILLE

Twinbrook Library
202 Meadow Hall Drive 20851
Tuesdays by appointment
Bus: 26, 45, Q1, Q2, Q4, Q5, Q6
Metro: Red Line/Twinbrook

Bauer Drive Community Center
14625 Bauer Drive 20853
Thursdays & Saturdays by appt
Bus: 48; near 49 & 52

Bethany House
199 Rollins Avenue 20852
Wednesdays by appointment
Bus: 5, 26

Rockville Senior Center
1150 Carnation Drive 20850
Mondays by appointment
Bus: 45

SANDY SPRING

Friends House
17340 Quaker Lane 20860
Thursdays by appointment
Bus: Z2

SILVER SPRING

Colesville Presb. Church
12800 New Hampshire Ave.
20904
Monday evenings by appt
Bus: C8, Z2, 21

Long Branch Library
8800 Garland Avenue 20901
Wednesdays by appointment
Bus: 12, 14, 15, 16, 17, 18, C2, C4

Mid-County Rec. Center
2004 Queensguard Rd. 20906
Fridays by appointment
Bus: 26, 39, 49

Schweinhaut Senior Center
1000 Forest Glen Road 20910
4 Mondays (2/26, 3/26, 4/2, 4/9)
by appointment
Bus: 8

Silver Spring Library
900 Wayne Avenue 20910
Tuesdays by appointment
Bus: 15, 16, 17, 19, 20, F4, J4
Metro: Red Line/Silver Spr.

White Oak Community Ctr.
1700 April Lane 20904
Fridays by appointment
Bus: Near 10, Z6, Z8



Taxpayer: What to bring to your appointment

General

- Last year's (2016) tax return(s)
- Social Security cards or other official documentation for yourself and every individual on your return (**required this year**).
- Photo I.D. required for all taxpayers.
- Checkbook if you want to direct deposit any refund(s) into your bank account.

Income

- W-2 from each employer
- Unemployment compensation statements
- SSA-1099 Form showing the total Social Security benefits paid to you for the year, or Form RRB-1099, Tier 1 Railroad Retirement benefits
- 1099 Forms reporting interest (1099-INT), dividends (1099-DIV), proceeds from sales (1099-B), as well as documentation showing the original purchase price of your sold assets
- 1099-R Form if you received a pension, annuity, or IRA distribution
- 1099-MISC Forms
- Information about other forms of income
- State and local income tax refunds

Payments

All forms and canceled checks indicating federal and state income tax paid (including quarterly estimated tax payments)

Deductions

Most taxpayers have a choice of taking either a standard deduction or itemizing their deductions. If you have a substantial amount of deductions, you may want to itemize. You will need to bring the following information:

- 1098 Form showing any home mortgage interest
- A list of medical/dental expenses (including doctor and hospital bills and medical insurance premiums), a list of prescription medicines, costs of assisted living services, and bills for home improvements such as ramps and railings for people with disabilities
- Summary of contributions to charity
- Receipts or canceled checks for all quarterly or other paid tax
- Property Tax bills and proof of payment

Health Insurance

- 1095A Forms if you purchased insurance through the Marketplace (Exchange)
- 1095B/1095C Forms (if applicable)
- Any exemption correspondence from the Marketplace (if applicable)
- Lowest cost of employer-sponsored insurance offered to anyone on the return who declined such an offer and remained uninsured

Credits

- Dependent care provider information (name, employer ID, or Social Security number)
- 1098-T and 1098-E Forms (Tuition and Student Loan Interest)

For more information, including details on the “simple” returns our volunteers prepare and how to change or cancel an appointment, go to: www.montgomeryserves.org