



# OVERVIEW



# AARP<sup>®</sup> Tax-Aide<sup>™</sup> FOUNDATION

- 501(C )3 affiliated nonpartisan charity
- Established in 1961
- Foundation Programs are funded by grants, tax-deductible contributions from AARP members, the general public and AARP

Programs include:

- AARP Tax-Aide
- AARP Senior Community Service Employment Program
- AARP Benefits Outreach Program
- AARP Legal Information Project
- AARP Money Management



- AARP Tax-Aide is the nation's largest free, volunteer-run tax assistance and preparation service. It is available to taxpayers with low- and middle-income with special attention given to those age 60 and older.
- In 2006, there are nearly 32,000 AARP Tax Aide volunteers who are organized on a regional, state, district and local level.
- The volunteers hold a number of positions and provided tax assistance to over 2 million people at over 7000 sites across the country in 2006.



AARP Tax-Aide Offers a variety of services each year which include:

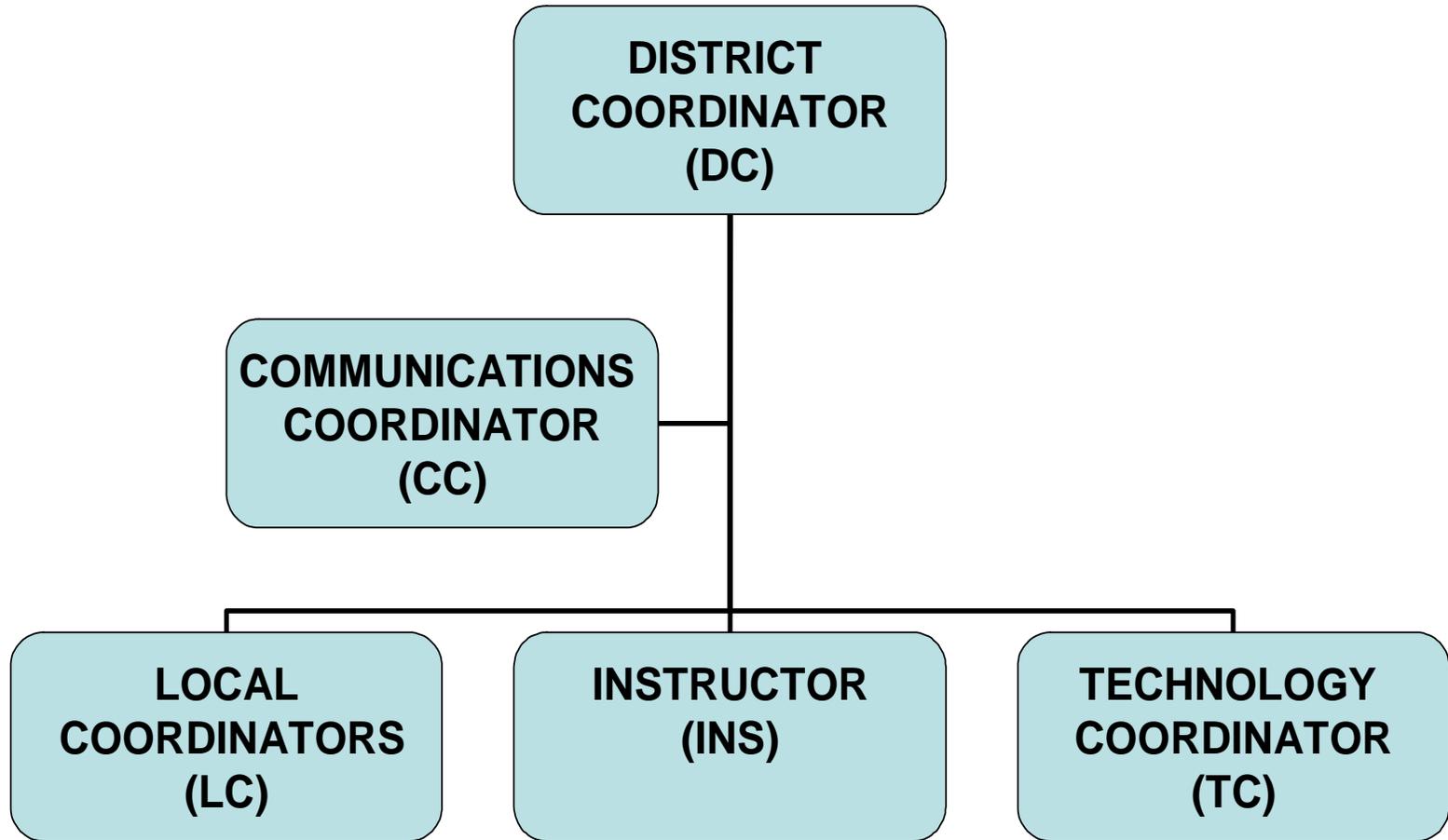
- Face-to-Face tax assistance and preparation from February 1 to April 15 at sites throughout the country such as libraries, senior centers, hospitals, banks and grocery stores.
- Free electronic filing (e-filing) at over 5,000 tax preparation sites from February 1 to April 15 nationwide. E-filing is more accurate and processes tax returns quicker.
- Free year-round tax counseling on the Internet allows taxpayers to post tax questions to online counselors 24 hours a day, seven days a week. Visit the website at [www.aarp.org/taxaide](http://www.aarp.org/taxaide).

**AARP TAX-AIDE ACTIVITIES REPORT**

October 2, 2006

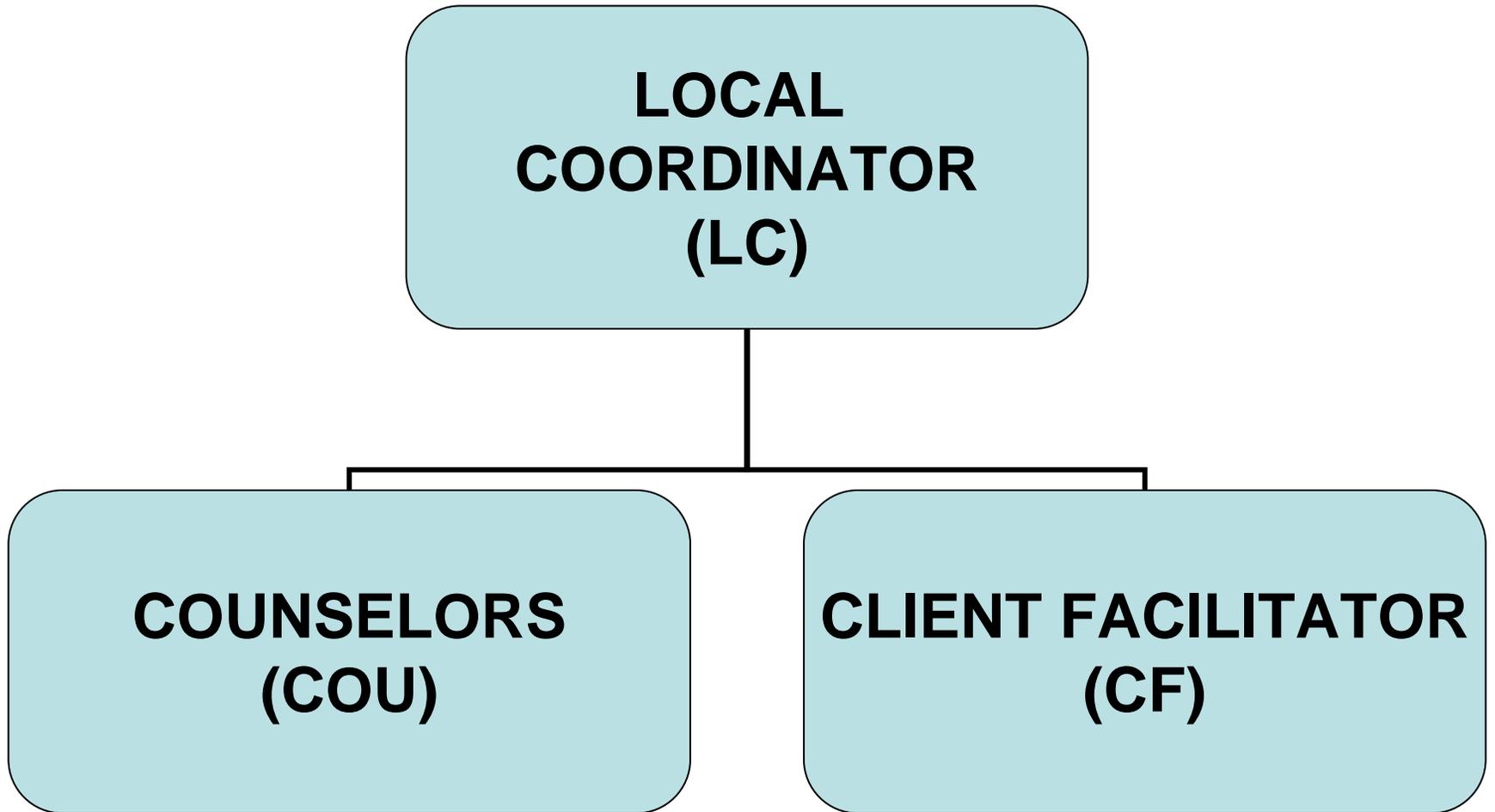
	<u>NJ</u>	<u>NY-1</u>	<u>NY-2</u>	<u>NY-3</u>	<u>NY-4</u>	<u>PA-1</u>	<u>PA-2</u>	<u>NOR ATL</u>	<u>NATIONAL</u>
<b>Total # of People Helped</b>	<b>43,637</b>	<b>14,386</b>	<b>15,965</b>	<b>24,287</b>	<b>28,850</b>	<b>51,521</b>	<b>44,908</b>	<b>223,554</b>	<b>2,026,177</b>
<b><u># of Returns</u></b>	<b><u>49,256</u></b>	<b><u>21,131</u></b>	<b><u>18,222</u></b>	<b><u>32,347</u></b>	<b><u>38,373</u></b>	<b><u>60,080</u></b>	<b><u>51,631</u></b>	<b><u>271,040</u></b>	<b><u>2,223,494</u></b>
SIDN report returns	19,295	8,859	7,144	14,247	15,378	21,304	19,608	105,835	1,036,846
Federal Returns	22,697	10,243	8,782	16,002	18,877	26,018	22,056	124,675	1,199,557
State/Local Returns	26,559	10,888	9,440	16,345	19,496	34,062	29,575	146,365	1,023,937
% Quality Reviewed	43%	51%	28%	77%	51%	41%	44%	48%	70%
<b><u>E-Service</u></b>	<b><u>8,583</u></b>	<b><u>5,375</u></b>	<b><u>2,439</u></b>	<b><u>12,758</u></b>	<b><u>10,949</u></b>	<b><u>13,329</u></b>	<b><u>12,670</u></b>	<b><u>66,103</u></b>	<b><u>875,626</u></b>
UTS reported e-files	9,229	5,258	2,613	13,646	11,204	13,619	12,177	67,746	865,321
% Fed Returns E-filed	37.3%	52.5%	27.7%	79.7%	57.8%	51.2%	57.4%	52.9%	72.6%
% change from prior year	32.0%	35.5%	143.5%	34.0%	33.4%	38.3%	45.0%	38.9%	21.8%

# DISTRICT ORGANIZATION CHART

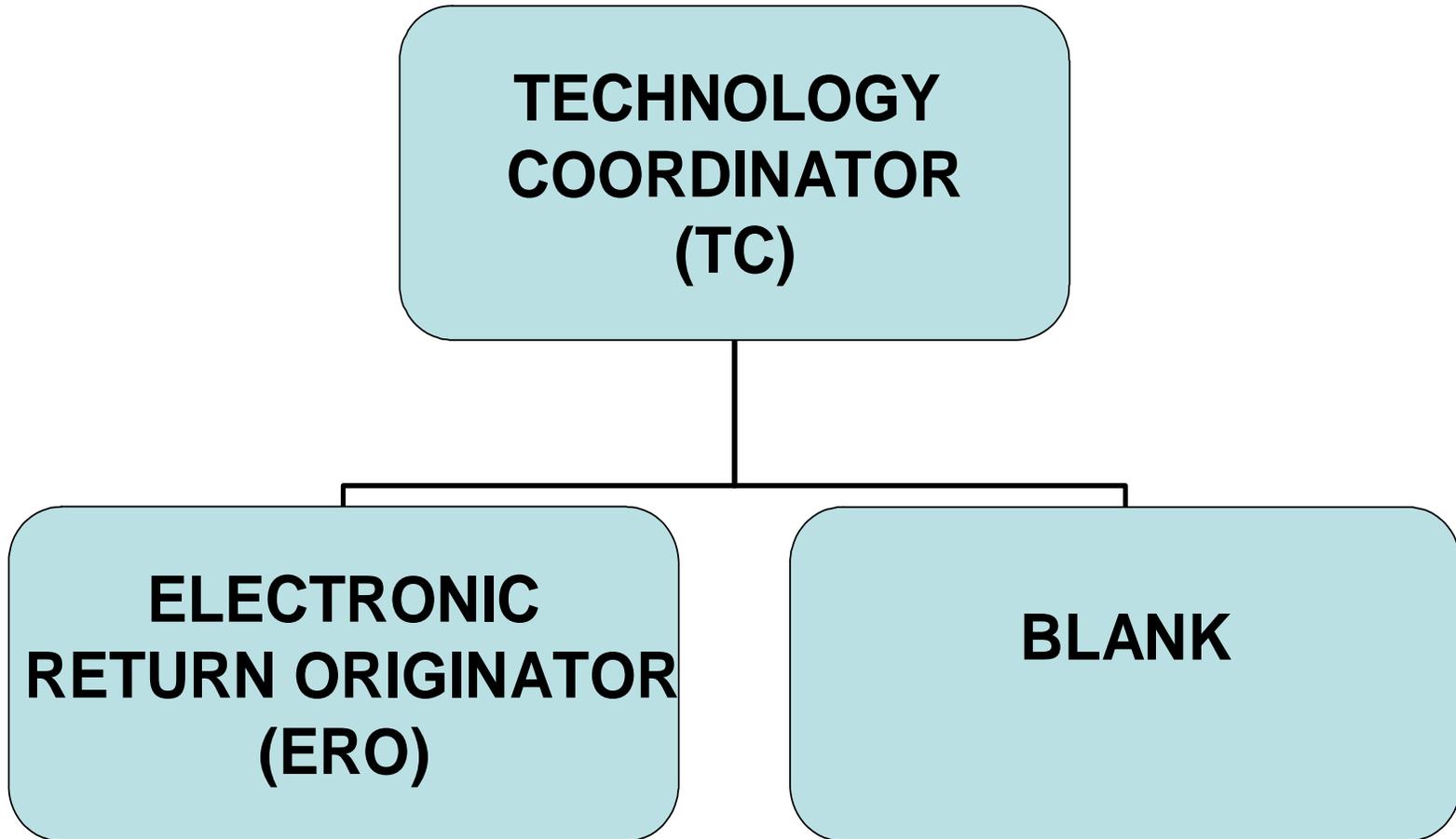


# DISTRICT ORGANIZATION CHART

## LOCAL COORDINATOR



# DISTRICT ORGANIZATION CHART TECHNOLOGY COORDINATOR



## **PA1 GOALS-AARP TAX-AIDE PROGRAM**

- **RECRUIT QUALIFIED VOLUNTEERS TO SERVE AS DC, LC, INS, TC AND COUNSELORS.**
- **AGGRESSIVELY SEEK COMPUTER LITERATE VOLUNTEERS**
- **IMPROVE TRAINING CURRICULA**

## **PA1 GOALS-AARP TAX-AIDE PROGRAM**

- **IMPROVE SITE MANAGEMENT**
- **INCREASE E-FILING PRODUCTION**
- **INCREASE THE USE OF COMPUTERS**
- **PROVIDE SUFFICIENT COMPUTER TRAINING**
- **RECRUIT QUALIFIED VOLUNTEERS IN THE SPANISH COMMUNITY**

# ADMINISTRATIVE ISSUES CONFIDENTIALITY/SECURITY

- ALL COUNSELORS MUST SIGN THE STANDARDS OF CONDUCT STATEMENT
  - I WILL SAFEGUARD TAXPAYER INFORMATION
  - I WILL EXERCISE REASONABLE CARE IN THE USE OF EQUIPMENT AND SUPPLIES
  - I WILL NOT SOLICIT BUSINESS FROM TAXPAYERS OR USE THE KNOWLEDGE I HAVE GAINED ABOUT THEM.

# **ADMINISTRATIVE ISSUES CONFIDENTIALITY/SECURITY**

- **SECURITY-SAFEGUARD THE CONFIDENTIALITY OF TAXPAYER INFORMATION**
  - DO NOT DISCLOSE ANY PERSONAL TAX INFORMATION
  - DO NOT OPENLY DISCUSS TAXPAYERS BY NAME TO OTHERS.
  - DO NOT RETAIN TAYPAYER(S)' DOCUMENTS FOR A FOLLOW-UP VISIT.
  - DO NOT TAKE TAXPAYERS' INFORMATION OUTSIDE THE PRESENCE OF THE TAXPAYER.
  - DO NOT PREPARE A TAX RETURN WHEN YOU SUSPECT AN INDIVIDUAL IS NOT PROVIDING TRUTHFUL INFORMATION.



## TYPE OF VOLUNTEERS

- RETIRED PEOPLE
- PART TIME WORKERS
- WORKERS WHO ARE WILLING TO HELP ON WEEKENDS



## EXPERIENCE/BACKGROUND

- ENGINEERS
- RETIRED TAX PREPARERS
- ACCOUNTANTS
- COMPUTER PEOPLE
- FINANCIAL PEOPLE



## TAX TRAINING AT STATE LEVEL

- MEETINGS WITH IRS: MAY/OCTOBER
- TRAINING IN DEC. - 3 DAYS

DISTRICT COORDINATORS

TECHNICAL COORDINATORS

INSTRUCTORS



## TAX TRAINING AT DISTRICT LEVEL

- NEW VOLUNTEERS – 5 DAY CLASSES
- RETURNING VOLUNTEERS - 2 DAY CLASSES
- ALL VOLUNTEERS MUST PASS A TEST TO DEMONSTRATE COMPETENCY IN 2006 TAX LAW. (6-10 HOURS)
- COMPUTER TRAINING CLASSES (8-10 HOURS)



## FREE ASSISTANCE TO TAXPAPERS

- FEDERAL TAXES
- PA STATE TAXES
- PA STATE RENT REBATE FORMS
- LOCAL TAXES



## LOCATE AARP TAX SITES

- CALL 1-888-AARPNOW
- [WWW.AARP.ORG/TAXAIDE](http://WWW.AARP.ORG/TAXAIDE)

ON THE LEFT SIDE OF THE SCREEN  
CLICK 'TAX AIDE SITES'.  
ENTER YOUR ZIP CODE