

## **Morris County TaxAide needs your help**

Morris County TaxAide is an AARP sponsored volunteer organization which provides assistance to taxpayers in completing their annual Federal and State Tax Returns. Volunteers are needed to assist taxpayers at local tax sites, to prepare tax returns, to provide technical assistance in computer usage / operations, and to provide scheduling coordination and communications. Morris TaxAide currently has 50 active volunteers (before COVID we had 70 +) and we are turning away taxpayers needing assistance.

The TaxAide Assistance program is a wonderful experience to help people who are “overwhelmed” with the task of doing their individual tax returns. As a volunteer who has been participating in the Tax-Aide Program for the past fifteen years, I have found the experience to be fun as well as personally fulfilling, as our clients are very appreciative of our assistance.

The following are a few items to note as you think about volunteering:

- All new volunteers who will assist with preparing taxes will need to participate in a training program that starts in the middle of November. This training will cover Federal and New Jersey tax law as well as how to use the TaxSlayer tax preparation software provided to AARP by IRS. In addition, it will prepare you for the IRS proficiency / certification test that we all must take prior by mid-January 2024. The training will involve roughly a dozen classes and meetings (some in person and others via internet meetings) between mid-November 2023 and late January 2024. All in person meetings (as well as volunteer sites) are in Morris County.
- New volunteers who would prefer not to prepare taxes but would be willing to help manage the client flow at our various tax preparation sites or do other administrative tasks will only need to attend two or three training classes in December and January.
- Once IRS certified, volunteers are encouraged to volunteer at least two days a week between February 1 and mid-April 2024. Our tax preparation sites currently are only open on weekdays (if enough Volunteers are interested, a Saturday site may be opened). We have no evening hours. Historically we have had have sites in Boonton, Roxbury, Wharton, Denville, Parsippany, Morristown, Chatham, Madison, Kinnelon, Chester, and Jefferson (the number of sites is a function of the number of volunteers available)

- Our clients are primarily retirees and those with limited incomes, although we will assist all taxpayers who seek our assistance regardless of age or income who fall within our IRS restrictions. I can assure you; the tax returns of many senior taxpayers can be very challenging.
- Most of our volunteers are comfortable with numbers and with using a computer. Some but not everyone may have some familiarity with preparing tax returns (either for themselves or family members, or as part of their employment). Our training programs are designed to provide familiarity of the program needs to everyone. We are not required to know tax law; rather the training teaches us when we need to seek out the needed information for the return and where to get it. Also, at our sites, we work as a team, so assistance is always available from other on-site volunteers. The TaxAide program supplies the necessary computers and all required training documents.

If you are interested in pursuing this further or need further information, **please email [MorrisTaxAide2022@gmail.com](mailto:MorrisTaxAide2022@gmail.com)**. I will arrange a phone call so that I can answer any questions / concerns you may have about the Program. I hope to hear from you soon!

Bob Casey, Morris County TaxAide Coordinator