



To: House Ways and Means Committee
From: Colin Hilliard (chilliard@aarp.org | 802-238-5693)
Advocacy Director, AARP Vermont
Re: AARP Foundation Tax-Aide
Date: February 11, 2025

Dear Chair Kornheiser, Vice Chair Canfield, and members of the committee,

My name is Colin Hilliard, Advocacy Director of AARP Vermont. On behalf of AARP Vermont's 110,000 members, I want to thank you for the opportunity to testify on the impact that the AARP Foundation Tax-Aide program has in supporting low- and moderate-income taxpayers, older adults, and individuals who face barriers to accessing tax assistance.

Started in 1968, Tax-Aide is the nation's largest free, volunteer-based tax assistance and preparation program and has served over 80 million people. Last year, nearly 28,000 volunteers served almost 1.7 million taxpayers nationwide, 965,000 of whom were adults over 50 with low income. And here in Vermont, 214 volunteers served approximately 7,100 families at 65 locations around the state, resulting in refunds totaling \$5,038,154. Tax-Aide is offered in conjunction with the IRS, and AARP membership is not required.

Even modest refunds can make an impact, especially for vulnerable older adults. AARP Foundation Tax-Aide helps put money back in the pockets of thousands of Vermonters every year by making sure they don't miss out on the credits and deductions they have earned. For older adults on fixed incomes, even small errors can have outsized consequences, making accurate tax preparation not only important but critical for their financial well-being. The AARP Foundation Tax-Aide program ensures that these individuals have access to trained, knowledgeable volunteers who can help maximize their benefits while avoiding costly mistakes.

AARP Foundation Tax-Aide volunteers undergo IRS training and certification each year to ensure they are up-to-date with the latest changes to the U.S. tax code. This partnership has been key to ensuring that the program operates with the highest standards of quality and integrity. The program's strong relationships with community partners further increase accessibility to people who may not have internet access, transportation, or the ability to navigate the complexities of tax season on their own.

In conclusion, the AARP Foundation Tax-Aide program has had a profound, positive impact on millions of taxpayers, especially those in older adult and low-income communities. By providing free, expert tax preparation services, the program helps ensure that those most in need of assistance are able to navigate the complexities of the tax system, claim valuable credits and deductions, and achieve greater financial stability.

I am grateful for the Committee's attention to this important issue, and I encourage continued support for the AARP Foundation Tax-Aide program and other similar initiatives that serve vulnerable populations around the state. Thank you for the opportunity to testify, and I would be happy to answer any questions you may have.

Please see below for basic information on how to access the Tax-Aide services and types of assistance:



- **In-Person Service:** Tax preparation is completed by an IRS-certified Tax-Aide volunteer on-site in one visit.
- **One-Visit Scan:** Tax documents are scanned at the Tax-Aide site and then Tax-Aide volunteers prepare the return remotely.
- **Two-Visit Scan:** Tax documents are scanned at the Tax-Aide site and then volunteers prepare the return remotely. During a second visit, taxpayers work with a volunteer to finalize their return and obtain a printed copy for their records.
- **Drop-Off Service:** Tax documents are left at the Tax-Aide site with a volunteer and the return is prepared remotely. During a second visit, taxpayers work with a volunteer to file their return and obtain a printed copy and their original documents.
- **No Site Visit Required (Internet Access Required):** Taxpayers upload tax documents to the IRS-provided software. Tax-Aide volunteers prepare the return remotely and work with the taxpayer to file the return electronically.
- **Online Coaching:** Taxpayers prepare their own return and receive online support from a volunteer to help them along the way.
- **Facilitated Self-Assistance:** Taxpayers schedule an appointment at a Tax-Aide site to work with a volunteer to complete and file their own return.
- **Self-Preparation:** Taxpayers prepare their own return using a software product that has been made available through the Tax-Aide website.

Users can find their nearest Tax-Aide location and assistance options through the Tax-Aide [site locator](#). The site locator features a Tax-Aide chatbot that can help book an appointment, answer questions about the program, and transfer the conversation to a live agent if needed or requested. For more information, including which documents to bring to the tax site, visit aarpfoundation.org/taxaide or call 1-888-AARPNOW (1-888-227-7669).