

Through the efforts of AARP's Tax Department, the AARP Foundation has been able to qualify and receive sales tax exemption in many states. In some states, we do not qualify for sales tax exemption. For those states in which the AARP Foundation (and hence the AARP Tax-Aide program) qualifies for tax-exempt status, the current tax exempt form is posted here.

The sales tax exemption certificates should be used only in the purchase of site and e-file support items such as office supplies, printer paper, printer cartridges, food and beverages for meetings and sites, etc. as well as hotels/motel rooms for AARP Tax-Aide meetings. The procedure to use the tax exemption certificate we would like to suggest is to do the following:

1. - Make a copy of the certificate and take it with you to the vendor.
2. - At the time of purchase, you should indicate to the cashier that you are a tax-exempt organization. At that point, the cashier may request a copy of the exemption certificate, the federal EIN#, or request that an additional form be filled out. In most cases, this will involve more time than usual; i.e., it may take an extra 5 to 10 minutes to complete the purchasing process.

We appreciate your patience with these vendors, as our compliance will assure an easier time later on during audits. In addition, the first few times may be a little time consuming, but eventually the vendor should come to recognize the AARP Foundation and seamless and less costly purchases should ensure.

Questions concerning the use of the exemption certificates and the process should be directed to the Sr. Field Support Technician at the National Office.

You may make as many copies of the exemption certificate, exemption form, and IRS exemption letter as needed to give other AARP Tax-Aide volunteers authorized to purchase supplies and materials.