

AARP FOUNDATION TAX-AIDE

Taxpayer Information and Responsibilities

Welcome to AARP Foundation Tax-Aide. Our IRS-certified volunteers will assist you shortly. In the meantime, please take a moment to read the following information.

Taxpayers will:

- Provide all required information and documents to ensure the completion of your return(s)
- Sign in at the tax site and follow the guidance of the volunteer
- Complete the Intake Booklet fully and accurately
- Participate in the intake interview, tax preparation and quality review process
- Inform the volunteer of all income including cash, gambling winnings, etc.
- Understand that some returns are beyond the program scope (see scope poster) or have complicated state or other issues. If your return falls outside the program scope, you must either prepare your own return or engage a professional preparer.
- Ensure the return is complete and accurate before

signing. Joint returns require the signature of both spouses.

- Agree that you are responsible for the accuracy of the return
- Treat volunteers with courtesy and respect
- Questions? Call 888-687-2277 or email taxaide@aarp.org

Tax-Aide volunteers will:

- Treat taxpayers in a courteous and professional manner
- Prepare tax returns within the scope of the program
- Provide tax assistance based on the information and documents provided by the taxpayer
- Quality review all tax returns
- Respect taxpayers' privacy and confidentiality

Essential Documents to Have at the Tax Site

- Government-issued photo ID for the taxpayer(s) on the return
- Social Security cards or ITIN documentation for all
- Copy of last year's tax returns
- Income documents for wages, interest, dividends, capital gains/losses, unemployment compensation, pensions and other retirement income, Social Security benefits, Railroad benefits, and self-employment income.
- Brokerage statements – sale of stocks or bonds
- Healthcare – Forms 1095-A if you have marketplace insurance
- Mortgage interest, medical/dental expenses, charitable donations, sales, income or property taxes
- Records of federal and state income taxes paid
- Educational expenses – Form 1098-T, student's detailed financial account, other education expenses, and Form 1098 for student loan interest.
- Checking or savings account information (printed or actual copy) for direct deposit of refund or direct debit of balance due. Note: The IRS announced phase out of paper tax refund checks began on September 30, 2025
- Any other recent IRS or state tax department correspondence
- Please bring copies of all tax documents
- Documentation of Identity Protection PIN
- Loan and vehicle details for new vehicles financed after 2024

Tax-Aide Process

Waiting Area

Sign In
Complete Intake Booklet
Organize Your IDs, SS Cards and Tax Documents

Tax Preparation

IDs, SS Cards Checked
Intake Booklet and Tax Documents Reviewed
Taxpayer Interviewed
Tax Return Prepared

Quality Review

IDs, SS Cards Checked
Intake Booklet and Tax Documents Reviewed
Taxpayer Interviewed
Tax Return Reviewed
Return Signed