

**AARP TAX-AIDE FOR 2025 TAXES
REQUIREMENTS FOR TAX RETURN PREPARATION**

READ THIS DOCUMENT FROM TOP TO BOTTOM

The following items **must** be brought to your appointment for your tax returns to be prepared:

- * Photo ID for each person filing the return.
- * SS Card(s), or SS statement(s) of benefits, Form SSA-1099, for each person listed on the return. This includes all dependents listed. If we cannot verify SS numbers for all individuals listed on the return, the return will not be prepared.
- * **Completed** Intake/Interview Form 13614-C (non-shaded areas for all pages).
- * All tax documents and IRS communications for 2025 taxes (e.g. W-2s; SSA Statements; 1099-Rs; 1099-B; Interest & Dividend Statements).
- * Bring a copy of last year's return (TY24), even if prepared by a different AARP Tax-Aide location or another preparer.

ADDITIONAL REQUIRED DOCUMENTS WHICH MAY OR MAY NOT APPLY TO YOU:

- **If you answer yes to one or more of these questions, completion of the screening form is required before your appointment. If you have not picked up a form at The Gathering Place at Kennett, visit gatheringplacekennett.org/aarp to download the relevant form. Complete it at home and bring it with you to your appointment.**
- **Education** – *Did you or your dependent pay for college or other higher education last year?*
- **Overtime Pay** – *Did you earn a lot of overtime pay last year?*
- **Vehicle Loan Interest** – *Did you buy a new vehicle in 2025 using a loan and pay interest on it?*
- **Self-Employment** – *Did you have any self-employment income, side jobs, contract work, or run a small business last year? – Please be sure to read back side information about out of scope business returns.*

Reminders:

- * If you are expecting to file a joint tax return, both taxpayers must be present at your appointment.
- * AARP Tax-Aide will only file your returns electronically. If you do not want to use e-file for your taxes, we cannot prepare your return.
- * **Please bring a check for the account you plan to use for banking information for filing.**
- * Only one (1) tax return can be prepared for each appointment. Family members wishing to have their taxes prepared need to schedule a separate appointment.

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Out of Scope Tax Services

Some tax situations are “out of scope” for Tax-Aide counselors. If such a situation is discovered, the counselor will have to stop preparing your tax return. For example, we cannot prepare returns with following (this is a partial list of common situations):

- Businesses with employees/contract labor, home office, inventories, depreciation, or those reporting a net loss.
 - Rental of personal property, other than land
 - Stock options
 - EV credits
 - Crypto currency income or losses
 - Most types of K-1 income
- ★ Please arrive about 15 minutes before your appointment time to allow for check-in at The Gathering Place front desk. For 9:00am appointments, arrive 5 minutes early. For appointments at Friends Meeting (Thursday's) please arrive 15 minutes before your appointment time to check in.
- ★ **If you cannot make your appointment, please call as soon as possible (610) 444-4819 to reschedule or cancel. Do not just ignore your appointment and fail to show up. The tax preparers are all volunteers and their time is valuable!**
- ★ Taxpayers receive a printed copy of all returns that are filed. All tax documents and paperwork is returned to the taxpayer. Taxpayers are contacted on the status of their return **only** if a filing issue occurs.