

AARP Tax-Aide 2023 Tax Year

Thank you for considering AARP Tax-Aide return services for the 2023 tax year.

AARP Tax-Aide services will be providing same day tax return preparation.

Steps:

1. You will make an appointment with the facility.
2. On the appointed day you will arrive at the scheduled day and time.
3. We will complete an intake interview, take your tax documents and schedule your return visit the same day to pick up your completed tax return.
4. You will return to sign your return and pick up all your tax documents.

What you need to do:

1. Review the reverse side of this notice for what to bring
2. Completely fill out the Intake/Interview & Quality Review Sheet (Form 13614-C)
3. Gather all of your tax documents. Be sure to bring your 2022 prior tax returns, if you can locate them.
4. Bring the completed forms, and all tax documents on your assigned day and time
5. You will return later the same day to pick up your tax return

2023 REQUIRED DOCUMENTS

Personal Identification

- Driver's License
- Social Security/ITIN (Social Security/ITIN Card or SSA 1099-R statement)
- Bank Routing and Account numbers (from voided check) to support direct deposit

Supporting Process documents

- Form 13614-C Intake/Interview and Quality Review Sheet (completed and signed)
- 2022 Federal and State returns (from last year) and accompanying documents

Common Supporting Tax Documents

- Any correspondence from the IRS or state tax agencies
- All Form W-2s (from employers)
- All Unemployment 1099-G
- All Form 1099-R (from Social Security, Pensions, IRA Distributions)
- All Form 1099-INT (from banks, credit unions)
- All Form 1099-DIV (from brokerage firms)
- Property Tax Statements (from County Tax Office)
- Brokerage Statements containing 1099-DIV, 1099-INT, 1099-OID, 1099-B

Less Common Supporting Tax Documents

- Form 1099 (1099-MISC, 1099-LTC, 1099-K, 1099-NEC, 1099-C, etc.)
- Form 1098 (1098-T from schools, 1098-E for student loans, etc.)
- Form 1095 (from health insurance providers or employers)
- W2-G (gambling winnings)
- Documents to support itemized deductions (medical receipts, charity donations)
- Documents to support claims for home energy credits (invoices, energy efficiency certificates)
- Documents to support business expenses