

AARP TAX-AIDE Tax Preparation at Stillwater Public Library, 1107 S. Duck St., is by APPOINTMENT ONLY

The "Drop Off and Pick-Up" method used at this AARP Tax-Aide site is as follows.

- 1) A taxpayer/s packet must be picked up at the Library. Included are instructions along with Intake/Interview and Quality Review sheets that must be completed before the first of two Appointments.
- 2) The taxpayer(s) will arrive at their 1st appointment with the following:
 - a) Photo ID (such as driver's license) for the taxpayer **AND** spouse, if Married filing jointly.
 - b) Social Security card for **EACH** person on your tax return (**copies are recommended**).
 - c) Completed Intake/Interview sheets.
 - d) All applicable tax documents. **Again, copies are recommended.**
- 3) The taxpayer(s) will be interviewed by a Tax Counselor to review the Intake/Interview sheets and all tax documents. All taxpayers must sign Form 14446 authorizing tax return preparation. A required Document Inventory Checklist prepared by the Counselor will indicate what tax documents are received and must be signed by both the taxpayer and the Tax Counselor. All tax documents received will be placed in a Tax Record Envelope. This envelope with the Intake/Interview sheets, Form 14446, and taxpayer documents will be securely filed according to the date of the taxpayer's first appointment and accessible only by Tax Counselors.

The taxpayer(s) will then leave the library. The tax return will be prepared and Quality Reviewed by a 2nd Tax Counselor before the 2nd Appointment date.
- 5) The taxpayer(s) will **return to the Library on Friday of the same week and at the same time** as their 1st appointment. At this time, the taxpayer and a Tax Counselor will review the tax return. After the review, the taxpayer(s) will sign Form 8879 authorizing electronic filing of the tax return. The taxpayer will then receive a copy of the completed tax return as well as all of their tax documents.
- 6) The tax return will be electronically filed by an AARP Tax Counselor.

1st Appointment on Tuesday _____ at _____
2nd Appointment on Friday _____ at _____

REMEMBER: If you fail to bring all necessary tax documents, making another appointment may be **VERY DIFFICULT**.