

This year AARP TAX-AIDE Tax Preparation is by APPOINTMENT ONLY

The "Drop Off" method being used will be handled as follows:

- 1) Taxpayers will schedule an appointment with the Stillwater Public Library. They may pick up a packet of materials at that time, or arrive 30 minutes prior to their appointment time on the day of their appointment.
- 2) The taxpayer(s) will come to 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 packet
 - d) all tax documents
- 3) The taxpayer(s) will be interviewed by a Tax Counselor to review the Intake packet and each of their tax documents. The all taxpayers must sign Form 14446 to authorize the tax return to be prepared. A required Document Inventory Checklist will indicate what tax documents are received and must be signed by both the taxpayer and the Tax Counselor. All the tax documents received will be placed in a Tax Record Envelope. This envelope, along with the Checklist, will be securely filed according to the date of the taxpayer's first appointment and will have access limited to Tax Counselors.
- 4) The taxpayer(s) will then leave the library. The tax return will be prepared and Quality Reviewed by Tax Counselors during the next few days.
- 5) The taxpayer(s) will **return 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 to authorize filing of their tax return. The taxpayer will then receive a copy of the completed tax return as well as all of their tax documents and can then leave the library.
- 6) The tax return will be electronically filed by an AARP Tax Counselor.

1st Appointment on Monday _____ at _____ am

2nd Appointment on Friday _____ at _____ am

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