

Important Information for AARP Tax Prep. Appointments:



Please remember to bring:

Social Security cards or statements for yourself, spouse and all dependents

Government Issued Photo ID for each tax payer

Income related documents (e.g. SSA, W2, unemployment statement, 1099s, mortgage interest income)

Expense related documents (e.g. Tax receipts, 1098s, medical insurance, medical expenses, charity, mortgage interest paid)

If you want to use **direct deposit or withdrawal**, bring your checkbook or a check with your name printed on it.

For those folks who had their taxes done with us last year, remind bring your tax envelope for the 2024 (or previous) tax year too.

Brokerage statements and Schedule K-1s might not be mailed until mid to late March, so if you have these, make your appointment after late March OR be willing to change the appointment OR file an amended return once they receive these documents.