

## AARP Appointment Guidance (effective January 2026)

AARP Foundation Tax-Aide provides tax assistance free of charge with a special focus on taxpayers who are over 50 with low to moderate income. **HOWEVER**, the service is open to anyone, regardless of age or income level. Taxpayers who have a unique situation or a complicated return may make the appointment and then contact the Avon Lake AARP Tax Prep Assistance to explain their situation to determine if AARP can handle their return.

AARP Avon Lake Tax Prep assistance at (216) 765-3386 or  
[aarpavonlaketaxprep@gmail.com](mailto:aarpavonlaketaxprep@gmail.com)  
A volunteer will reply within 24 hours  
(Monday-Friday 9 AM-4 PM)

- An appointment is required for each return prepared. If the taxpayer needs both 2025 and 2024 tax year returns completed OR a married couple is filing separately, **TWO** appointments must be scheduled. Please be **on time...not too early and not late for your appointment**...Expect each appointment to last approximately 60-90 minutes.
- For each person listed on the tax return, please bring a **photo ID, Social Security card (or number on a government document), all 2025 tax documents, and the 2023 and 2024 returns (if available)**. Changes in the tax laws may require information from both previous years' returns. It is helpful for the taxpayer to check all tax documents against their 2024 return to ensure they received everything needed...especially the IRS PIN if one was used in 2024.
- Please make sure you have **all your tax documents** by your appointment date. If you are missing something, please call the library (440-933-8128) and reschedule your appointment. We expect to complete your return during the single appointment.

Tax documents may include:

- Income document examples: W-2, 1099-R, SSA-1099, 1099-NEC/MISC, 1099-INT/DIV, Brokerage statements, Jury duty, gambling/prize winnings
- Deduction documents examples: 1098-T (education expenses); 1098 (home loan interest); Medical Expenses; Charitable donations; gambling expenses

- Special documents: IRS PIN document for 2025 (should have been received in January 2026. Only required if one was used previously or recently required from the IRS)

### NEW INFORMATION FOR TAX YEAR 2025

- Bank account information for direct deposit refunds...**PLEASE NOTE: THE IRS IS MOVING AWAY FROM PAPER CHECKS SO ELECTRONIC REFUNDS WILL BE REQUIRED. It is unclear at this time if any paper checks will be issued for refunds during 2025 Tax Year filing.**
- If financing a new vehicle purchased in 2025 and expecting to deduct interest paid you **MUST HAVE THE VEHICLE VIN NUMBER and you must know the interest amount paid.**
- If claiming energy efficient improvement purchases (doors, windows, HVAC), **MUST HAVE MANUFACTURE'S CODE FOR EACH ITEM**
- If claiming tips or overtime, **MUST HAVE THE AMOUNTS IF NOT CLEARLY ON THE W-2 DOCUMENT AS WELL AS BEING ABLE TO DESCRIBE THE JOB.**
- If a joint return, **both individuals** must be at the appointment unless there is a compelling reason, i.e. nursing home resident, home bound, etc. Tax documents for both spouses must be available.
- All COVID-19 safety protocols are optional, that is, counselors and taxpayers MAY wear masks if desired.
- As long as the library is open, AARP will be available to honor your appointment. If there is bad weather, contact the library to ensure they are open. If they are, and you do not feel comfortable driving in the bad weather, please contact the library to cancel your appointment. Your safety is most important. We will make every effort to reschedule your appointment.

Any questions, please contact AARP Avon Lake Tax Prep assistance at (216) 765-3386 or [aarpavonlaketaxprep@gmail.com](mailto:aarpavonlaketaxprep@gmail.com)  
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