

AARP TAX PREPARATION Nanini Library

7300 N Shannon Rd, Tucson AZ 85741 **Mondays 10:30 am – 2:00 pm**

We are 100% WALK-INS (No appointments, LIMITED number of weekly returns dependent on available staff, approximately 15-24 returns). We will start assigning numbers between 10:00 - 10:30 a.m. outside the Library. Wait times can be quite long. **SHOWING UP DOES NOT GUARANTEE GETTING ON THE LIST.** You must manage your own rides, medications, water, or snacks. Pet and/or childcare arranged outside of the Library. All Library rules take precedence.

REQUIRED PAPERWORK Download from the link below or pick up in advance at the Nanini Library Information Desk. **Online:** <https://aztax-aide.org/taxpayer-information>. The **Before You Arrive** section has all downloadable forms, most are fillable. **You must have your complete prior return, Social Security card/statement, Gov't Photo ID, and the Intake Booklet and Supplemental Forms to get on the list!**

HOW LONG WILL IT TAKE TO GET YOUR TAXES DONE? Required Forms: Allow 15 – 30 minutes to complete the forms *prior to* signing in for Tax Preparation. A **Client Facilitator** may preview your documents. Allow at least 2 hours for **Tax Preparation and Quality Review** *after* you sit down with a **Preparer**. We assign numbers as you come in; however, we reserve the right to take Taxpayers out of order if necessary to match the estimated complexity of a return to the experience level of an available Preparer and/or Quality Reviewer. Accuracy is our priority.

WHAT YOU NEED WITH YOU BEFORE MEETING A PREPARER:

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| <ul style="list-style-type: none">• Your complete paper copy of 2024 Returns/AARP Envelope or packet from another preparer• Completed 2025 Intake Forms/Tax Aide Packet• Govt Issued Photo ID Taxpayer, Spouse (if MFJ)• IRS Identity Pin(s), IF APPLICABLE• Social Security Card – for everyone listed on return• Social Security or RR Statement(s) IF APPLICABLE• Printed copies of all required forms to complete your taxes accurately – not on your phone! | <ul style="list-style-type: none">• Look at last year's return to help you gather required forms from all 2025 sources.• Bank account and routing numbers for direct deposit/debit. Bring an actual check. The IRS says that paper refund checks are over 16 times more likely to be lost, stolen, altered, or delayed than electronic payments. <i>The IRS may implement a "no paper checks policy" this year or next. Fees may apply.</i> |
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IMPORTANT RESTRICTIONS

We cannot prepare your return if **ANY** of these apply:

- More than 2 Broker's statements per individual on the tax return
- More than 4 W2-G forms per individual on the tax return
- More than 5 1099-R forms per individual on the tax return
- **Incomplete documentation of income and or expenses (Sch C Self-Employment)**
- Any Out-of-Scope Tax Situation
- Any Tax Situation deemed to be beyond the experience of Preparers at the Site.

The Most Common Out of Scope Situations, but there may be other reasons we cannot prepare your return.

Additional Medicare tax (Not inc. IRMMA surcharge)	Out of state returns (Limited exceptions)
Bankruptcy	Rental income (except vacant land with no expenses)
Digital Assets, Bitcoin, Cryptocurrency (purchase only)	Self Employed – Incomplete Records of Mileage, expenses
Farm income	Self-Employed - If Expenses over \$50,000
Foreign tax credit above \$300 (S/HOH) or \$600 (MFJ)	Self-Employed Net Loss, or w/employees, or Home Office
Married Filing Separately	Solar credits

WE STRIVE TO START THE LAST RETURNS NO LATER THAN 2 PM.