

Appointment date: _____ Time _____

AARP Tax-Aide 2025 Income Tax Checklist

At AARP Tax-Aide Volunteers, our goal is to provide accurate income tax preparation at no cost to taxpayers. Volunteers have extensive training in preparing basic and some advanced tax returns, but are not eligible to complete returns considered "Out of Scope," such as: Schedule F (Farm Income), Schedule C (self-employment income) with a loss, Schedule E with expenses, and tax issues listed on the reverse side of this Checklist.

The local AARP Tax-Aide site is located at the Manhattan Senior Center at 301 N 4th St. To make an income tax preparation appointment, call 785-537-4040 during business hours (Monday thru Friday, from 9.00 a.m. to 3:00 p.m.). Appointments begin on Feb. 2. Please try to arrive 15 minutes before your appointment.

Please use this checklist to organize your personal 2025 income tax information prior to your appointment:

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| YES | NO | Photo identification for you (and spouse). |
| YES | NO | Social Security cards for <u>everyone</u> living in your home <u>and others for whom you provide financial support (or previous income tax return if no changes)</u> |
| YES | NO | Completed intake form (either a blank form from Senior Center or access the form at kstaxaide.com). |
| YES | NO | Your 2024 tax return. |
| YES | NO | 2025 tax documents, such as W-2s, 1099s, and letters from the IRS. If you have Tip or Overtime pay, you will need to be able to document it if you want an adjustment on your taxable income. |
| YES | NO | Social Security benefit report (<u>SSA-1099</u>) (if you receive Social Security payments). |

Note: If you have misplaced or not yet received your Social Security benefit report, you may call the local SS office (877-840-5741) to request a copy be mailed to you. To request a copy, you will need to provide your full name, current address, date of birth, place of birth, and mother's maiden name.

To obtain a duplicate online, go to: socialsecurity.gov, if you have established an online account or wish to establish an account.

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|-----|----|--|
| YES | NO | Many people can itemize deductions on their Kansas return. Please bring a summary of deductible expenses, such as real estate tax, property tax on vehicles, unreimbursed medical expenses, medical insurance premiums, mortgage interest, sales tax receipts if you purchased a new or used car, and charitable contributions, etc. If you bought and financed a new car in 2025, you may be able to deduct interest on the car loan. Bring documentation including the VIN number of the car. |
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If you own your home and would like us to prepare a Homestead property tax refund form, you will need to bring a copy of your 2025 property tax statement for the home AND AMOUNTS OF 2025 INCOME RECEIVED BY EVERYONE LIVING IN THE HOME, including their social security number. (Other income items needed include alimony, welfare assistance, foster home assistance, foster grandparent assistance, senior companion stipends, and grants/scholarships unless paid directly to the school.)

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|-----|----|---|
| YES | NO | Bring your checkbook for your checking account to request direct deposit for any refunds you may get. |
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NOTE: If you are not able to answer "YES" to each of the above, we may not be able to complete your tax returns.

2025 Out of Scope Short List TaxAide

“Out of Scope:”

- Moving Expenses
- Farm Income or Loss (Land rent only okay with insurance and property tax and 4835 but no Schedule F)
- Oil and Gas Extraction (Royalty income OK)
- Rental income (Land rent okay as noted above. Personal residence rent okay if 14 days or less. Personal house rent 14 days or less is not taxable income.)
- Kiddie Tax – Any dependent with an unearned income greater than \$2,500. Unearned income is interest, dividends, capital gains, trust payments. W-2 wages and self-employment income are examples of earned income.
- Alternative Minimum Tax. (We may not know about this until your tax return is completed.)
- Employees you paid wages to
- Donation of Capital Gain Property
- Donation of a vehicle or boat valued more than \$500.
- Nonresident Alien taxpayer.
- Sole Proprietor Business is in scope with cash basis accounting only. However, the following are not in scope.
 - Business with a loss
 - Depreciation
 - Cost of goods sold
 - Business has employees
 - Claiming expenses for business use of your home
 - Sale of business Assets
 - SEP or Simple retirement plan within business.
- 1099-PATR Taxable Distribution from a cooperative.
- A trust tax return. (Requires filing a 1041 form.)
- A corporate tax return. (Requires filing a 1120 or 1120-S form.)
- K-1 forms from trusts or Subchapter S corporations are in scope. Some non-typical categories are out of scope.
- Casualty or Theft losses
- Active military returns
- Sell or trade digital currencies

Thank you in advance for gathering essential tax information. We look forward to working with you.