AARP Tax-Aide
Out of Scope

AARP Tax-Aide helps low- and moderate- income taxpayers, with special attention to those 60 and older, file their personal income tax returns. Volunteers are trained to assist in filing tax forms and basic schedules, including the 1040, 1040A and 1040EZ. Taxpayers with complex tax returns are advised to seek paid tax assistance. Please see the list below for items that our volunteers have been trained to and can complete or cannot complete under the guidelines of the program.

Can Prepare

FORM:

- ✔ 1040EZ
- ✔ 1040A with Schedules 1, 2, 3 and EIC
- ✔ 1040 with Schedules A, B, C-EZ, EIC, R
- ✔ Simple Schedule D
- ✔ 1040-V
- ✔ 1040-ES (Estimated Payments)
- ✔ 2106-EZ (Employee Business Expense)
- ✔ 2441 (Child & Dependent Care)
- ✔ 8880 (Qualified Savings Credit)
- ✔ 8812 (Additional Child Tax Credit)
- ✔ 8863 (Education Credits)
- ✔ 9465 (Installment Agreement)
- ✔ 8379 (Injured Spouse)
- ✔ 1040X (if trained)
- ✔ Limited Schedule K-1 that provides information only for Schedule B or D (if trained)
- ✔ Contributions to Charities from an IRA

Cannot Prepare

- ✘ Schedule C (Business Profit and Loss)
- ✘ Complicated/Lengthy Schedule D (Capital Gains and Losses)
- ✘ Schedule E (Rental Property, Royalties, Partnerships, and Trusts that involve depreciation)

FORM:

- ✘ 2106 (Employee Business Expense)
- ✘ 3903 (Moving Expenses)
- ✘ 8615 (Minor's Investment Income)
- ✘ Some portions of Schedule As and Bs
- ✘ All other Schedule K-1s

In order to prepare an accurate return, AARP tax counselors can determine if a return is too complicated or outside the scope of their training.

AARP Tax-Aide volunteers must stay in the scope of our program (Can Prepare list) and prepare those returns for which they have been trained. Additionally, if your assistor or other assistors at your site has not received training on the above in scope items, or feels he/she cannot otherwise prepare an accurate return based on the volunteer's training or tax circumstances, they will inform you and suggest you seek assistance from a paid preparer. Thank you for your cooperation.

C2467 (908)

AARP FOUNDATION