

PRE-APPOINTMENT PACKET
AARP FOUNDATION TAX-AIDE – THURSTON COUNTY

AARP Foundation Tax-Aide will offer free tax preparation in Thurston County this year with appointments beginning in early February and ending April 15, 2026. We will be preparing and e-filing Federal tax returns at six locations in Thurston County as shown below. We can also assist taxpayers in applying for the Washington Working Families Tax Credit. We welcome taxpayers of all ages and income levels unless your return is outside the scope of our training. In most cases, your return will be prepared in one visit from start to finish unless you are missing important tax documents or identification.

This packet contains the **Intake/Interview & Quality Review Sheet** for Tax Year 2025 you'll need to fill out before you arrive for your appointment and a list of documents we need to prepare your return. **Please come prepared.**

How do I schedule an appointment? We start taking appointments on January 15, 2026, for appointments starting in early February. There are three ways to make an appointment:

1. Call our appointment line at **(360) 347-6276** and leave a message.
2. Make an appointment on our website at <https://taxaidewa20.org/online/>
3. Walk into one of our sites during open hours. We will accept same-day Walk-Ins if an appointment slot is available and at least one hour remains before closing. Or we can schedule an appointment for a later date.

If you leave a message on our appointment line, one of our volunteers will call you back within three business days. Your caller ID will show **(617) 675-4444** when we call. Please add this number to your phone contacts under Tax-Aide.

Site locations, and opening and closing times:

Site	ADDRESS	Days	Opening Closing Time
Lacey Senior Center	6757 Pacific Ave. SE, Lacey, WA 98503	Tue & Thur	12 to 4 pm
Olympia Community Center	The Olympia Center, 222 Columbia St NW, 2 nd Floor, Olympia, WA 98501	Tue & Thur	10:30 am to 3:30 pm
Lacey Timberland Library	500 College St. SE, Lacey, WA 98503	Thur & Sat	11 am to 4 pm
Panorama Chalet Apartments	1650 Circle Ln SE, Lacey, WA 98503	Wed & Fri	11 am to 4 pm
Tumwater Timberland Library	7023 New Market St. SW Tumwater, WA 98501	Mon & Wed	12:30 to 5:30 pm
Yelm Timberland Library	210 Prairie Park St., Yelm, WA 98597	Tuesday	12 to 5 pm

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What are the health and safety guidelines? Please cancel or reschedule if you are experiencing any cold, flu or COVID symptoms by calling our appointment line at (360) 347-6276 or doing it yourself if you have made your own appointment online.

How should I prepare for my appointment? Fill out the **Intake/Interview & Quality Review Sheet** before arriving for your appointment. Taxpayers who are self-employed, or who wish to itemize their deductions, report a Medicaid Waiver payment, claim an Education Credit, have gambling winnings, or claim deductions for tip or overtime income or the new deduction for interest paid on loans for new cars purchased in 2025 should pick up a worksheet at one of our Tax-Aide sites during open hours or download the worksheet from our website. You must also locate, organize, and bring all identification and documents we need to prepare your return. **Print and bring hard copies of all your tax documents.** You must complete a separate Intake/Interview & Quality Review Sheet for each year you want us to prepare a tax return using the relevant year form. Prior year forms can be found on our website.

What time should I arrive for my appointment? Please do not arrive more than 10 minutes before your appointment. However, you may arrive earlier if you need help completing the Intake/Interview & Quality Review Sheet or one of our worksheets.

Remember There Are Limits on the Type of Returns We Can Prepare. Our volunteers are required to stay within the scope of tax law and policies set by the IRS and AARP Foundation and our training. For example, we **can't** prepare returns with:

- Self-employment with employees, losses, expenses that exceed \$50,000, depreciation, or business use of home
- Hobby income
- Capital gains or losses from futures or options
- Royalty income with expenses if not from self-employment
- Gambling losses
- Complicated Schedule K-1
- Rental income, except for land only or personal residence for less than 15 days
- Tax on a child's investments
- Sale of virtual currency such as bitcoin
- Amendments to a return prepared elsewhere
- Other items outside our training

This is only a partial list of income or deductions that might make a return out of scope. A tax counselor may have to interview you and review your tax documents to decide if we can prepare your return.

For additional information and to schedule an appointment please Visit Our Website
<https://taxaidewa20.org/>.



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Document Name Hyperlinks	Taxpayer(s) Must Complete	When Needed?
Click on the Document Name to View the Document and Download If Needed		
Intake/Interview & Quality Review Sheet, Form 13614C for TY2025 Prior Year & Amended Returns TY 2024 TY 2023 TY 2022 TY 2021 TY 2020	Yes	You must complete this form prior to your appointment. You can fill it out manually or use a computer or other device to complete the form and then print single sided. If you have asked us to complete a prior year or amended return, you must complete this form for the applicable year.
Documents We Need	Review	Please review as you must bring all documents needed to prepare your return to your appointment. If you are missing any documents, we will cancel your appointment. In that case, you will have to reschedule if appointments are available or seek assistance elsewhere.
Self-Employed (Sch C) Worksheet	Maybe	Please complete this worksheet if you were self-employed during the applicable tax year.
Itemized Deductions (Sch A) Worksheet	Maybe	Please complete this worksheet if you believe that your itemized deductions for the applicable tax year might exceed your standard deduction.
Education Credits Worksheet	Maybe	Please complete this worksheet if you, your spouse, or any of your dependents received an IRS Form 1098-T during the applicable tax year. If you plan to claim any education credits, we will also need a copy of the student's account or billing statement showing what educational expenses they incurred.
Medicaid Waiver Payments Taxpayer Worksheet	Maybe	Please complete this worksheet if you provided personal care services to a Washington State Department of Social and Health Services (DSHS) client during calendar year 2025 or received a settlement payment in calendar year 2025 in <i>Liang vs State of WA DSHS</i> .

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Gambling Worksheet	Maybe	Please complete if you had any gambling winnings. All gambling winnings are taxable and must be reported, including those not reported on a Form W-2G or other tax document.
Qualified Tips Deduction Worksheet for Employees	Maybe	Please complete this worksheet if you worked in an occupation that customarily and regularly receives tips and you received cash tips reported on your W-2 or that you reported to your employer on Form 4070 or reported to the IRS on Form 4137.
Qualified Tips Deduction Worksheet for Self-Employed Workers	Maybe	Please complete this worksheet if you worked in an occupation during calendar year 2025 that customarily and regularly receives tips and you received tips shown on a 1099-NEC, 1099-MISC or a 1099-K. Self-reporting is not allowed.
Qualified Overtime Deduction Worksheet	Maybe	Please complete this worksheet if you were not exempt from the Federal Labor Standards Act (FLSA) and earned overtime for working more than 40 hours in a week or more than the standard number of hours for your occupation.
Qualified Passenger Vehicle Loan Interest Deduction Worksheet	Maybe	Please complete this worksheet if you paid interest on a loan for a new passenger vehicle secured by this loan that was purchased in 2025 and assembled in the U.S. You will need the 17-digit Vehicle Identification Number (VIN) and documentation of the interest paid.