Updated 01/23/26

AARP FOUNDATION TAX-AIDE
Facilitated Self Assistance

Taxpayer Eligibility Checklist

Is your adjusted gross income (AGI) **less than or equal to $89,000**? (See attached sheet if you need to estimate your AGI)

- ☐ Yes – you are eligible for Facilitated Self Assistance
- ☐ No – you are **not** eligible for Facilitated Self Assistance*

What tax year are you filing for?

- ☐ I need to file 2025 taxes – you are eligible to use Facilitated Self Assistance
- ☐ I need to file taxes for prior years – you are **not** eligible for Facilitated Self Assistance*

Do you have an email address that you can access AND a cell phone on which you can receive text messages? **Both are required to set up your Facilitated Self Assistance account.**

- ☐ Yes, **to both** – you are eligible for Facilitated Self Assistance
- ☐ No. **to one or both** – you are **not** eligible for Facilitated Self Assistance*

You must bring the following with you to your Facilitated Self Assistance appointment:

- ☐ All income documents, including:
  - ☐ W-2's from all jobs you worked
  - ☐ Gambling winnings (W-2G)
  - ☐ Pension income (1099-R)
  - ☐ Unemployment statement (1099-G)
- ☐ Prior year (2024) AGI (found on line 11 of your 2024 IRS Form 1040 or 1040-SR)
  - ☐ If you do not have your 2024 AGI, please page 2 of this document
- ☐ Your banking information for direct debit/deposit (bank name, routing number, and account number)
- ☐ Driver's license or official ID (may be needed if you are also filing a state tax return)

* If you are not eligible for FSA, check out the following for other options –

- https://myfreetaxes.com/ (this is option is income limited)
- https://www.aarp.org/money/taxes/aarp_taxaide/locations.html to locate a Tax-Aide site near you (appointment availability is limited)
- https://www.irs.gov/individuals/free-tax-return-preparation-for- qualifying-taxpayers for information on IRS free tax help

DETERMINE YOUR 2025 ADJUSTED GROSS INCOME (AGI)

Your 2025 adjusted gross income (AGI) must be **less than or equal to $89,000** to use Facilitated Self Assistance (FSA) to prepare and e-file your tax return.

1. If you do not have any new sources of income and you expect that your income will be similar to what it was for the 2024 tax year, you will find your 2024 AGI on line 11 of your IRS Form 1040 or Form 1040-SR.

2. If your income has changed from last year or if you have new or additional sources of income, please estimate your 2025 AGI as follows:

- **TOTAL** what you earned in 2025 from all sources:
  - Jobs you held (generally on Form W-2) $_____
  - Investment income (Forms 1099-I, 1099-B, 1099-DIV) $_____
  - Social Security (Form SSA-1099-R) $_____
  - Pensions (including IRA distributions) (Form 1099-R) $_____
  - Self-employment income (Form 1099-MISC, 1099-NEC, 1099-K, and cash payments) $_____
  - Unemployment payments received (Form 1099-G) $_____
  - Other income sources $_____
  - Other income sources $_____
  - Other income sources $_____
  - Other income sources $_____

  Total Income **$_____**

- **SUBTRACT** any of the following that you have for 2025:
  - Educator expenses (up to $300) $_____
  - Allowable business expenses $_____
  - Deductible HSA contributions $_____
  - Deductible self-employment taxes $_____
  - Deductible contributions to retirement plans $_____
  - Penalties on early withdrawals of savings $_____
  - Deductible IRA contributions $_____
  - Student loan interest $_____
  - Deductible tuition and fees $_____
- **Total Reductions of Income** **-$_____**

ESTIMATED 2025 ADJUSTED GROSS INCOME (AGI) **$_____****

** If this number is less than, or equal to, $89,000, you are eligible to prepare and e-file your tax return using FSA. Otherwise, see the preceding page for other possible options.