2026 AARP TAX-AIDE PROGRAM

(Tax Year 2025)

If you need Tax Forms:

- Tax forms can be downloaded via the State of New Jersey and IRS websites.
- Federal forms can also be ordered on the IRS website, to be mailed to your home.
- For assistance, please stop by the Reference Desk at any branch. Printing fees apply for tax forms printed at the library.

Website for State of NJ forms:
www.state.nj.us/treasury/taxation/gitforms.shtml

Website for IRS forms:
www.irs.gov

Free income tax preparation service is available at select branches of Monmouth County Library System. A limited number of returns may be prepared each session. Service is provided by trained AARP Foundation Tax-Aide Volunteers for most Federal and NJ tax returns. More complex returns with tax situations on which volunteers are not trained cannot be prepared. PLEASE NOTE: All taxpayers must be present when their tax return is prepared. If filing a joint return, both taxpayers must be present.

A list of the most common documents that AARP Tax-Aide preparers will need in order to prepare your tax return is shown on the reverse side of this flyer. There may be others if the taxpayer has a unique situation.

To view the most up to date AARP Tax-Aide operating schedule for All AARP's Monmouth Tax-Aide sites please go online to: https://Tinyurl.com/MonmouthTaxAide

MONMOUTH COUNTY LIBRARY - EASTERN BRANCH SHREWSBURY

February 7 through April 11

Tuesdays and Thursdays from 9 am to 5 pm
Saturdays from 9 am to 1 pm

BY APPOINTMENT ONLY, made online at:
https://tinyurl.com/TaxAideEasternBranch

**You can also call the AARP Foundation at 888-227-7669.

MONMOUTH COUNTY LIBRARY - HAZLET BRANCH

February 6 through April 13

Mondays from 1 pm to 5 pm
Fridays from 1 pm to 4 pm

No appointment.
Walk in, first come, first served.

MONMOUTH COUNTY LIBRARY - MARLBORO BRANCH

February 4 through April 9

Wednesdays and Thursdays from 10 am to 2:30 pm
Saturdays from 10 am to 12:30 pm

APPOINTMENTS ARE PREFERRED, made online at:
https://tinyurl.com/TaxAideMarlboroBranch

**You can also call the AARP Foundation at 888-227-7669.
Limited walk in availability before noon.

MONMOUTH COUNTY LIBRARY - WALL BRANCH

February 2 through April 10

Mondays, Tuesdays, and Fridays
from 1 pm to 4 pm

No appointment.
Walk in, first come, first served.

NOTE: These dates and hours are subject to change. *Depending on the volume of walk in clients arriving and the number of tax preparers available on any one day, the site coordinator will stop taking new clients when they believe acceptance of additional clients would overrun closing time. All The decisions by the site coordinator are final.

****NOTE: When calling for an appointment at 888-227-7669, press '0' to speak to an AARP Service Representative. You will be connected to a person who will assist you in making an appointment. This service will begin mid-January.**

SEE REVERSE SIDE FOR NEW DOCUMENTATION REQUIREMENTS.

MONMOUTH COUNTY LIBRARY

MonmouthCountyLib.org
MonmouthCountyLib.org/tax-assistance/
@MonCoLibrary

The following is a list of the most common documents that AARP Tax-Aide preparers require in order to prepare a tax return. There may be others if the taxpayer has a unique situation.

IDENTIFICATION DOCUMENTS:

- Social Security Card, Social Security Statement, or other official document from the US Government showing Social Security number and full name. This is required for the taxpayer, spouse (if a joint return) and all dependents. **NOTE:** Medicare cards no longer provide Social Security numbers and are not suitable as proof of ID.
- Driver's license or other government photo ID for the taxpayer and spouse (if a joint return).
- A blank or canceled check (which WILL be returned) to obtain bank routing and account numbers if you are requesting direct deposit of a refund.

TAX FORMS AND SUPPORTING DOCUMENTS:

- A copy of last year's tax return
- W-2 and the final end of year pay stub from each employer
- Unemployment Compensation Statement (NJ no longer mails this so the taxpayer must print it out online)
- SSA-1099 (Social Security Statement) if receiving Social Security Benefits
- All 1099 forms (1099-INT, 1099-DIV, 1099-B, etc.)
- Brokerage statements which must show the cost basis of any assets sold during the tax year
- 1099-NEC showing non-employee compensation
- 1099-MISC showing miscellaneous income
- 1099-R for any payments from a pension, annuity or retirement account
- All forms relating to federal and state income tax paid including records of estimated tax payments
- Dependent Care Provider information (including EIN or SS# of the provider)
- Supporting records: property tax, mortgage interest, medical expenses, charitable contributions, Homestead Benefit (Rebate), Property Tax Reimbursement (PTR) rebate, etc. If you participate in the NJ PTR program, please bring your PTR "blue book".
- Form 1095-A If health insurance was provided through the NJ Health Insurance Marketplace (GetCoveredNJ) you will need to provide 1095-A. If the taxpayer, spouse, and/or any person who could be claimed as a dependent did not have health insurance for the entire year, month by month details for each such person will be required to determine whether the taxpayer qualifies for any exemption from the Shared Responsibility Payment (NJ "penalty" for not having insurance).