



National Tax Training Committee

Self-Study Mentor Guide

Tax Year 2026

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SELF-STUDY MENTOR GUIDE

THE SELF-STUDY APPROACH

The AARP Foundation Tax-Aide Self-Study program offers volunteers the option to certify as Counselors through independent study of tax law and the use of software. As an alternative to instructor-led classroom training, this flexible, self-directed program provides a second path to certify as an AARP Tax-Aide Counselor or Client Facilitator in two ways:

- The student adapts the Self-Study program to their individual learning style and availability, or
- Two to six students form a study group working through the program together, either in person or virtually.

The Self-Study Program gives students flexibility and control over the learning process - not an instructor-led, scheduled class experience. It encourages students to learn at their own pace with the support, guidance, and encouragement from experienced Tax-Aide counselors: Mentors

With help from Mentors and the local Tax-Aide team, self-directed students work through the document: *Self-Study Counselor Training and Certification Course. Counselor Resources for Self-Study* is available to assist in locating valuable study resources.

MENTOR'S ROLE IN SELF-STUDY PROGRAM

A Mentor's role in the Self-Study program is essential to its success: to support and encourage Self-Study students throughout the learning process. The Mentor is the go-to person for each student: a guide, a motivator, and a resource, so that the student knows how to get help if needed.

The following checklist provides some suggestions to ensure that the Mentor-Student relationship is successful.

MENTOR CHECKLIST

- First, get familiar with the training materials used by students, including use of Tax-Aide resources, use of TaxSlayer for practice problems, and answer sheets for self-evaluation.
- Provide your contact information to students; encourage them to contact you with any questions on tax rules, resources, set-up, TaxSlayer, etc.
- If students form a group, help with scheduling meetings: in person or virtual.
- Explain timeline for certification test; discuss a schedule for tracking progress.
- Emphasize saving passwords.
- Explain steps to sign up for Link & Learn and TaxSlayer Practice Lab.
- Remind students that tax training can be challenging.
- Check in with students at least weekly to monitor their progress, identify challenges and encourage students when discouraged. If appropriate, suggest shifting to traditional classroom if self-directed learning is not effective.
- BE AVAILABLE.

QUALITIES OF A SUCCESSFUL MENTOR

- Loves the Tax-Aide program
- Wants to help bring more volunteers into the program
- Enjoys helping others
- Has time to give to working with one or more new volunteers
- Need not be a tax expert, but skilled at finding answers
- Willing to get familiar with Self-Study materials
- Has the time required to answer questions, set timelines, assist, encourage, and support Self-Study learners

Best of luck with your journey as a Mentor! Your encouragement to a new volunteer on their pathway to becoming a Tax-Aide Counselor is invaluable. We appreciate your efforts in supporting this very important role!