

## What should I bring with me to have my taxes prepared?

You should bring any statements, forms, receipts, or other documentation that show income you received, tax-deductible expenses, and property tax or rental payments you made.

You may disregard any that do not apply to you. The list below includes the most common documents.

### Required:

- Picture ID
- Social Security card (or Individual Identification Number (ITIN) card or letter) for all persons listed on your return
- Birth date for all persons listed on your return
- Last year's tax returns
- Routing and account number for your bank accounts if you would like your refund direct deposited or your balance due to come out of your bank account
- Income statements or forms:
  - Wages from each job (Form W-2)
  - Interest (Form 1099-INT)
  - Dividends (Form 1099-DIV)
  - Sale of stock (Form 1099-B)
  - Retirement Plan (Form 1099-R)
  - Gambling Winnings (Form W-2G)
  - Unemployment (Form 1099-G)
  - Social Security Benefits (Form SSA)
  - Miscellaneous income (Form 1099-MISC)
  - Statements showing income from other sources. Examples include: Supplemental Security Income (SSI), Minnesota Family Investment Program (MFIP), Minnesota Supplemental Aid (MSA), General Assistance (GA), veterans benefits, workers' compensation, etc.

### If applicable, also bring:

- Tuition expenses you paid to attend a university, college, or technical college (Form 1098-T)
- Interest statements for student loans (Form 1098-E)
- IRA contributions
- Records of any itemized expenses you may wish to deduct. This includes:
  - Out-of-pocket medical expenses
  - Charitable donations
  - Vehicle license tabs
  - Property taxes paid
  - Mortgage interest paid (Form 1098)
  - Tax preparation fees
  - Uniform costs
- Daycare expenses. For each provider you paid, you must provide the name, address, amount paid, and Social Security Number (SSN) or Employer Identification Number (EIN).
- Receipts for education expenses you paid for your children in grades K-12. This includes:
  - Educational software
  - Private school tuition
  - Tutoring
  - Academic books/materials
  - Music lessons and music equipment purchases or rentals
  - Tuition for academic summer camp
  - Instructor fees for drivers education
  - School supplies (pencils, notebooks, etc.)
- Business expenses up to \$25,000 (If your business has a loss, we cannot prepare your return)
- Health Coverage Statements (Forms 1095-A, B, or C)
- Property Tax Refund documents
  - Renters: Certificate of Rent Paid (CRP) from your landlord
  - Homeowners: Statement of Property Tax Payable mailed by the county in March
  - Mobile Homeowners: Certificate of Rent Paid (CRP) from your landlord and the Statement of Property Tax Payable mailed by the county in March

