

West Central MN Communities Action, Inc. Tax Sites

WHAT TO BRING CHECKLIST

- Valid Picture ID
- Social Security Cards or Individual Taxpayer ID Number (ITIN) for all persons listed on the tax return
- Birthdates for all persons listed on the tax return
- Prior year tax return if available
- Direct deposit information showing routing & account numbers (voided check is best)
- W-2s for ALL jobs worked in prior year
- Interest Statements (1099-INT)
- Dividend Statements (1099-DIV)
- Miscellaneous Income (1099-MISC)
- Retirement Plan Statements (1099-R)
- Unemployment Income (1099-G)
- Sale of Stock (1099-B)
- Gambling Winnings (W-2G)
- Social Security Benefits (Form SSA-1099) not estimate letter
- Supplemental Security Income (SSI) Year-End Statement
- MN Family Investment Program (MFIP) Year-End Statement
- MN Supplemental Aid (MSA) Year-End Statement
- General Assistance (GA) Year-End Statement
- Veterans' Benefits Year-End Statement
- Worker's Compensation Year-End Statement
- Statement Supporting Documentation of Alimony Payment Received
- Education expenses you paid (include receipts)
- Tuition Expenses (1098-T)
- Interest Paid on Student Loans (1098-E)
- Daycare expenses you paid
- Daycare provider's name, address and Tax ID number
- Charitable donations of cash (not to an individual or for which you received some benefit) and non-cash (including supporting documentation)
- Medical Expense: This applies to taxpayers who are homeowners and/or have paid *high medical expenses not reimbursed by insurance*. (Include totaled receipts)
- Proof of Health Care Coverage (1095A, 1095B, or 1095C)

Renters:

- Certificate of Rent Paid (CRP) from your landlord

Homeowners:

- Mortgage interest and real estate taxes paid
- If you made and energy improvements to your home (new insulation, windows or doors, etc.) Bring receipts and manufacturers certified statements
- Statement of Property Tax Payable in prior year (mailed by the county in the spring. Call your county property tax office with questions)
- Mobile homeowners: File your property tax return after you receive your prior year Property Tax Statement in June. You must enclose this statement and your CRP when you file your return