



"WHAT TO BRING" CHECKLIST

Please Bring:

- Valid Picture ID
- Social Security Card or Individual Taxpayer ID # (ITIN) 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)
- IPPIN- if applicable (Identity Protection PIN- tax-related identity theft victims will have this)

Income Documentation (bring whatever applies to you)

- W-2s for ALL jobs worked in prior year
- Social Security Benefits (SSA-1099)
- Interest Statement(s) (1099-INT)
- Dividend Statement(s) (1099-DIV)
- Proof of Health Care Coverage (1095A, 1095B, or 1095C)
- Miscellaneous Income (1099-MISC)
- Nonemployee Compensation (1099-NEC)
- Unemployment Income (1099-G)
- Retirement/Pension Statement(s) (1099-R)
- Sale of Stock (1099-B)
- Daycare Expenses you paid (include Daycare provider's name, address, and tax ID number)

Renters

- Certificate of Rent Paid (CRP) from your landlord

Homeowners

- 2023 Property Tax Statement (usually mailed out to homeowners mid-March). *If you don't have the statement by the day of your tax appt., we can print off your statement mid-March from your county website and file the property refund for you- no need to mail it in or drop it off. Let your preparer know you own a home)
- Mobile homeowners: File your property tax return after you receive your 2023 property tax statement in June. You must enclose this statement and your CRP when you file your return.

- Charitable donations of cash (receipts)
- Supplemental Security Income (SSI) Year-End Statement
- MFIP (MN Family Investment Program) Statement
- MSA (MN Supplemental Aid) Year-End Statement
- GA (General Assistance) 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)