

# Tax Preparation Appointment Checklist

*We cannot assist unscheduled appointments at this time.*

## Identification:

- ☐ Social security cards for everyone being claimed on the return
- ☐ IDs for individual and/or spouse

## Income:

- ☐ Wages for each job (W-2)
- ☐ Interest (Form 1099-INT)
- ☐ Dividends (Form 1099-DIV)
- ☐ Retirement plans (Form 1099-R)
- ☐ Unemployment (Form 1099-G)
- ☐ Social Security benefits (Form SSA)
- ☐ Year-end income statements from MFIP, SSI, MSA, GA, Veteran's benefits and worker's compensation

## Expenses:

- ☐ Education expenses
- ☐ Tuition expenses you paid to attend a university or technical college (Form 1098-T)
- ☐ Student Loan Interest (Form 1098-E)
- ☐ Daycare expenses you paid for your children (bring provider's name, address, tax ID or Social Security number)
- ☐ Charitable donations
- ☐ Homeowners: Mortgage interest and real estate taxes paid in 2025 (Form 1098) and statement of property tax payable in 2026 – mailed by county in March
- ☐ Renters: Certificate of Rent Paid (CRP)

## Banking information:

- ☐ For direct deposit - voided check, bank statement or other document from your bank showing your bank routing and account number

*Families may be eligible for the Minnesota Child Tax Credit. To learn more, go to:*

[www.revenue.state.mn.us/child-tax-credit](http://www.revenue.state.mn.us/child-tax-credit)