

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