

TAX PREPARATION CHECKLIST

Make sure you have all your documents for you and each person on your tax return.

1. Personal Information

- Picture **ID**
- Birthdate** for all persons listed on the tax return
- Social Security card** or **Individual Taxpayer Identification Number** (ITIN) card or letter for all persons listed on the tax return
- Direct deposit information:** voided check or routing and account number

2. Income & Public Benefit Statements

- W-2s** for each job
- All **1099** forms received
- Year-end income** for MFIP, SSI, MSA, GA, veterans' benefits, workers' compensation

3. Education & Child Care Credits

- Record of **educational expenses** for children in grades K-12 (including school supplies, tutoring, etc.)
- Tuition expenses** for university, college or technical school
- Interest statement** for student loans
- Child care expenses:** provider, name, addresses, Tax ID, or Social Security number

4. Property Taxes

- Homeowners:** Mortgage interest & real estate taxes paid in 2020 & Statement of Property Tax Payable in 2021 mailed by county in March
- Renters:** Certificate of Rent Paid (CRP)

5. Additional Documents

- Previous year's **tax return**
- Verification of **health insurance** for each person listed on the return if purchased through MNsure
- Record of charitable **donations**

Notes: