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Description automatically generatedNECESSARY DOCUMENTS: What do I need to bring?

**The following items are required at the time of your appointment:**

* **Photo ID** for you (and spouse, if applicable)
* **Social security** or ITIN (tax ID #) cards (or photo copies) for all in family
  + not needed if prior year tax return was done by one of our tax sites (see below\*) AND

you bring a copy of the tax return showing all those ITINs and social security numbers

* It is recommended that you bring **a copy of prior year returns** (a transcript can be ordered from the IRS at 800-908-9946). It may get you a better refund and provide for a more accurate filing.
  + If you had MN refunds, it is recommended you bring any Minnesota Department of Revenue **check stubs**.
* Completed **IRS Intake forms**included in this packet
* **W-2s** and any tip information
* **1099-SSA** – has pink box showing total social security amount for the year before the Medicare subtraction is taken (if lost, call 877-405-3631 to obtain); can also serve as SSN verification
* **1099-INT** or information from bank if less than $10 – **Bank statement** showing total of interest received during the year
* **1099-DIV** – dividends received during the year
* **1099-R** – IRA or pension retirement income for the year
* **1099-G** – unemployment compensation received
* If filing for MN rent or homestead credit refund, documentation of total of nontaxable income received during the tax year, such as:
* SSI (Supplemental Security Income); if don’t have a letter showing total for tax year, go to Social Security office (206 Broadway Ave S, Suite 600 in Rochester) or call 877-405-3631 to have a letter mailed to you
* County cash assistance; if lost the letter they send in January showing the total of cash benefits received during the year, call county case worker for a copy
* Veterans Benefits
* Scholarship – also need this info on a 1098-T if want to apply for education credit
* If a homeowner, and want to file for a MN M1PR Homestead Credit Refund, income of other  person living in home (unless they are a dependent or parent)
* Any other income of any kind received during the year. Front line worker pay, gambling winnings, election worker, etc
* **Charitable contributions** made during the year for contributions over $500 may qualify for a state deduction.
* If itemizing on federal (homeowner) – taxes paid, medical expenses, health insurance paid.
* Closing statement if bought or sold a home
* **Certificate of Rent Paid** forms received from landlord for current tax year
* **Property tax statement** for taxes payable in 2025 (if a homeowner)
* **Health Insurance Information** if purchased through MN Sure (need Form 1095-A)
* For direct deposit/faster refund,**voided check or card/statement from bank** listing **routing number and account number**. If none, suggest they may want to open a bank account
* Any Power of Attorney or other document giving authority to file for another

**All income and expense information should be for 2024 tax year**

**and/or prior tax year(s) if want a return done for prior year(s)**

\*Tax Year 2024 Tax sites:

Salvation Army, 125 Live, Bethel Lutheran Church, Stewartville Center for Active Adults, Mantorville Senior Ctr, Sylvan Manor

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