

What should I bring with me to have my taxes prepared?

You should bring any statements, forms, receipts or other documentation that show income you received, tax-deductible expenses, and property tax or rental payments you made. The list below includes the records needed most often; you may disregard any that don't apply to you.

Required:

- Photo identification
- Social Security cards (or Individual Identification Number (ITIN) card or letter) for you, your spouse, and all dependents listed on your return
- Birth dates for you, your spouse, and all dependents listed on your return
- Last year's tax returns
- If you wish to use the direct deposit/direct debit option, be sure to bring your checkbook with you to verify your bank account and routing information.
- Income statements or forms:
 - Wages from each job (Form W-2)
 - Interest (Form 1099-INT)
 - Dividends (Form 1099-DIV)
 - Sale of stock (1099-B)
 - Retirement Plans(Form 1099-R)
 - Gambling Winnings (Form W-2G)
 - Unemployment (Form 1099-G)
 - Social Security Benefits (Form SSA)
 - Miscellaneous income (1099-MISC)
 - Any other statements showing income from other sources (Examples include Supplemental Security Income (SSI), Minnesota Family Investment Program (MFIP), Minnesota Supplemental Aid (MSA), General Assistance (GA), veterans' benefits, workers' compensation, etc.)

If applicable, also bring:

- Tuition expenses for university, college, or technical college (Form 1098-T)
- Interest statements for student loans (Form 1098-E)
- IRA contributions
- Records of any itemized expenses you may wish to deduct, such as:
 - Out-of-pocket medical expenses
 - Noncash donations
 - Cash donations
 - Vehicle license tabs
 - Property taxes paid
 - Job-related moving expenses
 - Mortgage interest paid (Form 1098)
 - Tax preparation fees
 - Uniform costs
- Daycare expenses (For each provider you paid, you must provide the name, address, amount paid, and Social Security Number (SSN) or Employer Identification Number (EIN).)
- Receipts for education expenses you paid for your children in grades K-12, such as:
 - Educational software
 - Private school tuition
 - Tutoring
 - Academic books/materials
 - Music lessons and music equipment purchases or rentals
 - Tuition for academic summer camp
 - Instructor fees for drivers education
 - School supplies (pencils, notebooks, etc.)
- Property Tax Refund documents
 - Renters: Certificate of Rent Paid (CRP) from your landlord
 - Homeowners: Statement of Property Tax Payable mailed by the county in March