

Lakes & Prairies Tax Site

WHAT TO BRING CHECKLIST

- Valid Picture ID
- Social Security Cards for all persons listed on the tax return
- Birth Dates for all persons listed on the tax return
- Prior year tax return
- Direct Deposit information showing routing & account numbers
- W-2's for **ALL** jobs worked in 2009
- Interest Statements (1099-INT)
- Dividend Statements (1099-DIV)
- Retirement Plans (1099-R)
- Gambling Winnings (W-2G)
- Unemployment Income (1099-G)
- Social Security Benefits (SSA)
- Supplemental Security Income (SSI) Year-End Statement
- MN Family Investment Program (MFIP) Year-End Statement
- MN Supplemental Aid (MSA) Year-End Statement
- General Assistance (GA) Year-End Statement
- Veterans' Benefits Year-End Statement
- Worker's Compensation Year-End Statement
- Supporting Documentation of Alimony Payment Received
- Education expenses you paid (include receipts)
- Tuition Expenses (1098-T)

- Interest Paid on Student Loans (1098-E)
- Daycare expenses you paid
- Daycare provider's name, address and Tax ID number
- Charitable donations of cash and non-cash. Include supporting documentation
- Medical Expense: This applies to taxpayers who are homeowners and/or have paid **high medical expenses not reimbursed by insurance**. (Include receipts)

MN RENTERS:

- Certificate of Rent Paid (CRP) from your landlord

HOMEOWNERS:

- Mortgage interest and real estate taxes paid in 2009
- If you made any energy improvements to your home (new insulation, windows or doors, etc) bring receipts.
- MN Homeowners:** Statement of Property Tax Payable in 2010. (Mailed by the county in March. Any questions call your county property tax office.)
- MN Mobile Homeowners:** File your property tax return after you receive your 2010 Property Tax Statement in June. You must enclose this statement and your CRP when you file your return.
- First time homebuyer** settlement statement