



AccountAbility Minnesota

tax & financial services for those in need

What to bring to our tax clinic

- For each person listed on the return, bring:
 - Social Security card or Individual Taxpayer Identification Number (ITIN) card or letter
 - Birth date
- Prior year's tax return (if available)
- Valid picture I.D.
- To receive your refund in 15 days or less, bring your checking and/or savings account information (account and routing number) or open a savings account or prepaid at card at the site

Income statements or forms:

- Wages from each job (Form W-2)
- Interest (Form 1099-INT)
- Dividends (Form 1099-DIV)
- Retirement Plans(Form 1099-R)
- Gambling Winnings (Form W-2G)
- Unemployment (Form 1099-G)
- Social Security Benefits (Form SSA)
- Miscellaneous income (1099-MISC)
- Sale of stock (1099-B)

If applicable also bring:

- Year-end income statements for MFIP, SSI, MSA, GA, Veterans benefits and workers' compensation
- Receipts for education expenses you paid for your children in grades K-12. For example: tutoring, rental/purchase of musical instrument, music lessons, pencils, notebooks, etc.
- Tuition expenses you paid to attend a university/technical college (Form 1098-T)
- Interest you paid on student loans (1098-E)
- Day care expenses you paid for your children. Bring provider's name, address and tax ID or social security number.
- Records of cash and non-cash charitable contributions
- Homeowners: Mortgage interest and real estate taxes paid in 2012 (Form 1098) and Statement of Property Tax Payable in 2013 mailed by the county in March
- Renters: Certificate of Rent Paid (CRP) from your landlord