



AMENDMENT REQUEST FORM

Who should use this form?

This form is intended for individuals who previously filed their taxes with Prepare + Prosper (P+P) and need to file an amended tax return (Form 1040X, M1X, or M1PRX).

You should file an amended return if you need to correct an original return to:

- Report additional income
- Claim additional credits or deductions (including adding dependents)
- Remove credits or deductions (including removing dependents)
- Change your filing status
- Respond to a letter from the IRS or Minnesota Revenue

How do I request an amendment?

Fill out the information on the reverse side of this handout and include copies of supporting documents. Submit this form by mail or in person to: 2610 University Ave W., Suite 450, St. Paul, MN 55114. You may also submit your request by fax at 651-287-0190. Please call 651-262-2167 with any questions.

How is an amendment processed?

Prepare + Prosper staff will prepare your amendment as soon as possible. The federal 1040X form can be electronically filed, but the state amendment forms will need to be sent in through the mail. Allow 3-4 weeks for staff to complete the return. Requests made January through April generally take longer due to the high volume of requests during this time.

After your amendment is prepared, P+P staff will contact you about the results and you will receive a copy of the return. You will need to sign and mail the amendment paperwork. IRS and Minnesota Revenue processing may take up to 16 weeks.

What's next?

If you have an additional refund coming, the IRS will mail a check to your address. Minnesota Revenue refunds can be deposited directly into your checking or savings account or mailed to your address.

If you have a balance due, you can mail a check or money order with your amended return. You can also make payments online or by mail after you send the return. P+P staff can provide you with additional information on paying a balance due.

Date: _____

Name(s) for taxpayer(s): _____

Phone: _____

Last four digits of Social Security Number(s) or ITIN: _____

1. If your address has changed since you filed your original return, enter your new address below.
Include address changes that will happen in the next 3-4 months.

2. What year(s) need to be amended: _____

3. If a Minnesota amendment results in a refund, do you want direct deposit?

Yes, deposit the refund into my account:

CHECKING OR SAVINGS

Routing number: _____ Account number: _____

No, send a check to my address.

4. What changes are you requesting?

Add a tax form. Include a copy of form(s) that need to be added, for example: W-2, 1099-R, 1098, 1095-A, etc. *For 1099-MISC see instructions for self-employment or business income. For 1098-T see instructions for tuition or education expenses.*

Add income or expenses related to self-employment or a business. Include a copy of form 1099-MISC and/or documentation of cash income or expenses. Additional information will be required to make this change. P+P staff will contact you to prepare the amendment or you can call 651-262-2159.

Add tuition or education expenses. Include a copy of Form 1098-T. Additional information will be required to make this change. P+P staff will contact you when preparing the amendment or you can call 651-262-2167.

Add a dependent. Include a copy of a social security card or ITIN letter or a copy of a previously filed tax return with the dependent's name and social security number listed. Answer the following questions:

1. What is your relationship to the dependent? _____

2. What is the dependent's date of birth? _____

3. How many months did the dependent live with you during the year? *Answer for each year you are amending:* _____

4. Was the dependent 18 years of age or under, or under 24 and a full-time student, at the end of the year? *Answer for each year you are amending:* _____

5. Can anyone else claim the person as a dependent? _____

Other. Provide a brief explanation and copies of supporting documents.

