

free TAX PREP

with us **free** means **free**

January 25 - April 18, 2023



IRS-certified volunteers passionate about taxes will get you your **MAXIMUM REFUND**

Let us help you get your money!

PREPARE + PROSPER

prepareandprosper.org

1 HOW CAN WE HELP?

Get your taxes prepared for free

Taxes are prepared by IRS-certified volunteers and double-checked for accuracy. Volunteers prepare federal and Minnesota tax returns, including property tax refunds for renters and homeowners.

Receive your refund faster

Direct deposit is the fastest and safest way to get your refund. Bring your routing and account numbers to your tax prep appointment, open a prepaid debit card on-site, or contact us to open a checking or savings account before your tax prep appointment.

Take a step towards your financial goals

Volunteers will connect you with resources to help you reach your financial goals, whether your goals are increasing savings, boosting credit, or reducing debt.

Looking for a better way to bank?

Check out FAIR banking— checking, savings, and credit builder accounts.

FairFinancial.org

2 DO YOU QUALIFY?

Annual income qualifications:



Individuals = \$35,000 or less



Families = \$55,000 or less



Self-employed = \$55,000 or less

**We aren't able to do your taxes if you have income from driving a cab, rental income, filed bankruptcy or had any transaction involving crypto currency in the tax year you wish to file. There are other, less common situations that are out of scope. If you are unsure whether we can do your taxes, please give us a call at 651-287-0187.*

3 PULL YOUR INFO TOGETHER

1. Personal Information

- Picture **ID** for taxpayer and spouse. If filing jointly, both must be present
- Birthdate** for all persons listed on the tax return
- Social Security card** or **Individual Tax Identification Number** (ITIN) card or letter for all persons listed on the tax return
- Routing and account numbers** for your savings account, checking account, and/or prepaid card

2. Year-End Income Statements

- W-2s** for each job
- 1099** forms for retirement, Social Security, unemployment, interest, dividends, stock sales, self-employment, and miscellaneous income
- Year-end amounts** for MFIP, SSI, MSA, GA, veterans' benefits, and workers' compensation

3. Education and Child Care Credits

- Record of **educational expenses** you paid for your children in grades K-12
- Tuition expenses** paid for you or your child to attend a college or university (Form 1098-T)
- Student loan **interest statement** (Form 1098-E)
- Child care expenses:** Provider name, address, and tax ID or Social Security number

4. Property Tax Refunds and Deductions

- Homeowners:** Mortgage interest and real estate taxes paid in 2022 and 2023 Property Tax statement mailed by the county in March
- Renters:** Certificate of Rent Paid (CRP)
- Mobile home owners:** All of the homeowner and renter documents listed above

5. Additional Documents

- Previous year's **tax return**
- Verification of **health insurance** if purchased through MNsure (Form 1095-A)
- Record of charitable **donations**

← PLEASE COLLECT ALL YOUR TAX DOCUMENTS FOR THE YEAR BEFORE YOU MAKE YOUR APPOINTMENT

4

FREE TAX PREPARATION OPTIONS



TAX PREPARATION BY APPOINTMENT ONLY

Appointment scheduling starts January 17, 2023.

All tax prep services are in-person and by appointment this year. We do not have any drop-off or virtual services available. **Please allow 2-3 hours for your tax prep appointment.**

Appointments can be scheduled on our website or by phone. Scheduling online is the best option as we do experience high call volumes during tax season. Please schedule your appointment AFTER you have collected all of your documents in step 3. Use the QR code below to visit our website for the most up-to-date scheduling status for all our tax site locations.

651-287-0187
prepareandprosper.org



TAX SITE LOCATIONS

Services are available at eight locations:

- American Indian OIC, Minneapolis
- CAPI USA, Brooklyn Center
- East Side Neighborhood Services, Minneapolis
- Hallie Q. Brown Community Center, Saint Paul
- Merrick Community Services, East St. Paul
- Prepare + Prosper Main Office, Saint Paul
- VEAP, Bloomington
- Urban League Twin Cities, North Minneapolis

All locations are wheelchair accessible.

DIY Tax Prep has unlimited capacity!

DO-IT-YOURSELF (DIY) TAX PREP

Prepare your own taxes for free with support from Prepare + Prosper! The DIY Tax Prep program guides you through the tax filing process with online trainings available weekly, a DIY Tax Prep Guide, and support via email or phone. This option is available to anyone with an annual income under \$73,000 who has easy access to technology. Visit prepareandprosper.org/do-it-yourself-tax-prep or use this QR code to access the software or to sign up for a training.



SELF-EMPLOYMENT TAX PREP

In-person Self-Employment (SE) Tax Preparation Clinics are back, and require an appointment. Clinics operate on Monday afternoons and Wednesday evenings at P+P's main office. Appointment scheduling also begins on January 17, 2023. Go to prepareandprosper.org, use this QR code or call **651-262-2169** to schedule a self-employment tax appointment if:

- your annual self-employment income is over \$6,000, up to \$55,000.
- you operate a daycare, or
- you use your home for your business.



PREPARE + PROSPER

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