



# 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. 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 16 to 20 weeks.

## What's next?

If you have an additional refund coming, it 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 numbers of SSN or ITIN: X X X - X X - \_\_\_\_ \_\_\_\_ \_\_\_\_ \_\_\_\_

**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 an 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-NEC 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 651-262-2169.

☐ **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.

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