

Taxes At Your Table - Income Tax Preparation Checklist

Income Information

- ☐ Wages/Salary – form W-2
- ☐ Tip Income
- ☐ Alimony
- ☐ Interest – form 1099
(savings/checking/bonds)
- ☐ Dividends – form 1099
(Stocks, Mutual Funds)
- ☐ Stock Trade Transactions – form
1099B
- ☐ IRA/Pension Distributions – form
1099R
- ☐ Social Security Income – form
1099SSA
- ☐ Sick Pay
- ☐ Unemployment Compensation
- ☐ State Income Tax Refund
- ☐ Prizes/Gambling Winnings
- ☐ Business Income (Self Employment)
forms 1099Misc, 1099NEC or 1099K
- ☐ Rental Income
- ☐ Sale of Property or Assets
- ☐ Other

Personal Information

- ☐ Address Verification
- ☐ Social Security Numbers Verified
- ☐ Dependents
- ☐ Date of Birth
- ☐ Occupation (optional)
- ☐ Bank Account Information for Direct
Deposit of Refund or payment due
- ☐ Healthcare coverage – form 1095A
MNsure, Exchange, Marketplace
- ☐ Presidential Campaign check box
(optional)
- ☐ Political Party Designation (optional)
- ☐ Virtual Currency Digital Asset trading
check box – (Receive, Sell,
Exchange, gift or dispose of during
the year)
- ☐ MN Non-game Wildlife Fund
\$_____
- ☐ Other

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Expense Information

- ☐ Property / Real Estate Taxes
- ☐ State Income Taxes Paid
- ☐ Automobile License Tabs (MN)
- ☐ Mortgage/Home Equity Interest Paid
- ☐ Health Insurance for Self Employed
- ☐ Mortgage Refinancing costs / points
- ☐ Student Loan Interest
- ☐ Investment Interest and Fees
- ☐ Work Related Expenses -state returns
(Dues, Uniform, Work Travel,
Training, Tools, Safety Equipment)
- ☐ Charity Cash Contributions
- ☐ Charity Non-Cash (Goods) Donations
- ☐ Volunteer auto mileage - documented ☐
College/Trade School Tuition and
Qualified Expenses – form 1099T
- ☐ Gambling Losses
- ☐ Major Casualty Loss
- ☐ Medical Expenses
(Doctors-medical, dental, eye,
Glasses, Prescriptions, Insurance,
COBRA Premiums, Hospital, Clinic,
Lab fees, Therapy, auto mileage)
- ☐ Other

Tax Credit Information

- ☐ IRA Contributions
- ☐ Retired Credit (age 65 +)
- ☐ Disability Credit
- ☐ Health Savings Account – form
1099SA
- ☐ Electric Vehicle – Clean Energy Credit
- ☐ Residential Energy Credit – group 1
(Wind generators, solar panels,
geothermal) - group 2 (windows,
doors, insulation, furnace, water
heater)
- ☐ MN Student (K-12) Education
Expenses (Supplies, Field Trips,
Tuition)
- ☐ Child Day Care Credit (Provider,
Address, Social Security Number)
- ☐ Teacher Classroom Expenses
- ☐ Home Buyer Credit (annual
repayment)
- ☐ IRS \ State Revenue Notices
- ☐ Other