

## **Taxes At Your Table - Income Tax Preparation Checklist**

### **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)**
- Virtual Currency Digital Asset trading**  
check box – (Receive, Sell, Exchange, gift or dispose of during the year)
- MN Non-game Wildlife Fund**  
\$ \_\_\_\_\_
- Other**

### **Income Information**

- Wages/Salary – form W-2**
- Tip Income**
- Overtime pay documentation**
- Alimony**
- Digital assets sales or exchanges – form 1099DA**
- 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**
- Business Income (Self Employment) forms 1099Misc, 1099NEC or 1099K**
- Sick Pay**
- Unemployment Compensation**
- State Income Tax Refund**
- Prizes/Gambling Winnings**
- Rental Income**
- Sale of Property or Assets**
- Other**

## **Taxes At Your Table - Income Tax Preparation Checklist**

### **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**
- IRS \ State Revenue Notices**
- Other**