

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

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