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

Questions? Contact us: Jason@taxesatyourtable.com Phone: 763-316-8243

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

☐ New vehicle loan interest – Form 1098-VLI or lender statement; purchase/loan documents and VIN

☐ Investment Interest and Fees

☐ Work expenses (state returns): dues, uniforms, travel, training, tools, safety equipment

☐ Charity Cash Contributions

☐ Charity Non-Cash (Goods) Donations

☐ Documented volunteer auto mileage

☐ College/trade school tuition and qualified expenses – form 1099T

☐ Gambling Losses

☐ Major Casualty Loss

☐ Medical expenses: medical, dental and eye care; glasses, prescriptions, insurance, COBRA, hospital/clinic, labs, therapy and auto mileage

☐ Other

Tax Credit Information

☐ IRA Contributions

☐ Retired Credit (age 65 +)

☐ Disability Credit

☐ Health Savings Account – form 1099SA

☐ 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

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