

# MINNESOTA 2020 ORGANIZER

1 Y\_/N\_ Education expenses you paid for your qualifying children in grades K-12. ....

- Academic or Enrichment (Outside regular school day or year)
- Individual Instruction - tutoring, music, et al (Outside regular school day or year)
- Required school materials and gym shoes (Need itemized receipt)
- Music Instruments rental or purchase (Used during regular school day)
- Transportation Costs paid to others (For regular school day)

A. Student Name \_\_\_\_\_ Grade \_\_\_\_\_ (circle) Public/Private/Home School

Class Type/Name: \_\_\_\_\_ Provider: \_\_\_\_\_ \$ \_\_\_\_\_

B. Student Name \_\_\_\_\_ Grade \_\_\_\_\_ (circle) Public/Private/Home School

Class Type/Name: \_\_\_\_\_ Provider: \_\_\_\_\_ \$ \_\_\_\_\_

2 Y\_/N\_ Education savings account contribution (Ex: 529 Plan) .....

Financial Institution \_\_\_\_\_ Account number \_\_\_\_\_ \$ \_\_\_\_\_

Financial Institution \_\_\_\_\_ Account number \_\_\_\_\_ \$ \_\_\_\_\_

3 Y\_/N\_ Parents of Stillborn Children

4 Y\_/N\_ Attaining master's degree in teacher's licensure field

5 Y\_/N\_ Student loan payments. . . . Total paid for Taxpayer \_\_\_\_\_ Spouse \_\_\_\_\_

6 Y\_/N\_ Long-term care insurance premiums paid .....

Name \_\_\_\_\_ Ins.Company \_\_\_\_\_ Account number \_\_\_\_\_ \$ \_\_\_\_\_

Name \_\_\_\_\_ Ins.Company \_\_\_\_\_ Account number \_\_\_\_\_ \$ \_\_\_\_\_

7 Y\_/N\_ Past military service

8 Y\_/N\_ Credit for Military Service in a Combat Zone request for tax form M99

9 Y\_/N\_ Unreimbursed employee expenses (Use the Organizer's Itemized Deduction section)

10 Y\_/N\_ Employer transit pass

11 Y\_/N\_ First-time Homebuyer Savings Account (Provide all acct details, \$ rec'd, purpose)

12 Y\_/N\_ Beginning farmer management credit

13 Y\_/N\_ Tax credit for owners of agricultural assets

14 Y\_/N\_ SEED Capital investment credit

15 Y\_/N\_ Increasing research activities and unused credit from prior years

16 Y\_/N\_ Credit for historic structure rehabilitation (enclose certificate)

17 Y\_/N\_ Taxpayer contribution \$ \_\_\_\_\_ to political party name: \_\_\_\_\_

Y\_/N\_ Spouse contribution \$ \_\_\_\_\_ to political party name: \_\_\_\_\_

18 Y\_/N\_ Political Contribution Refund tax form request (Need EP-3 contribution forms)

**19** Y\_/N\_ Renters: Provide Certificate of Rent Paid (CRP) for filing the renter's credit.

**20** Y\_/N\_ Homeowners: The online 2021 Statement of Property Taxes will be used for filing the Homeowner's refund. Each county provides this statement usually March or later. Do not send it to the tax office unless requested. If you sell, move, change bank accounts, or change filing status before October 15, please let the tax office know ASAP.

**Any special notes or questions regarding tax preparation?**