



What to Bring Checklist

We can prepare your 2018, 2019, 2020 or 2021 tax returns including Minnesota and Wisconsin returns. We can NOT do amendments if we did not originally file your tax return.

Personal Information

- Valid photo I.D. for yourself and spouse (if any)
- Social Security Card or document issued by the Social Security Administration for all persons listed on your return.
- Birth dates for all persons on the return
- Identity Protection PIN, if one has been issued to you, a spouse or a dependent by the IRS
- Bank routing and account number for direct deposit if you choose
- E-mail address (for signing digitally)
- If filing 2020 &/or 2021, the amounts you received in stimulus payments, also known as Economic Impact Payment (EIP)
- Amount received in advanced child tax credits in 2021
- Previous year tax return if you did not have your return done at CAD

Sources of Income

- Employed - Wages from each job (Form W-2)
- Self-Employed
 - Income - Form 1099-NEC, 1099-MISC, Schedule K-1, and Cash payments
 - Expenses – including business mileage
- Unemployment (Form 1099-G)
- Retirement Income
 - Social Security (Form SSA-1099)
 - Retirement plan distributions (Form 1099-R, CSF 1099-R or CSA 1099-R)
 - Railroad Retirement (Form RRB 1099 and RRB 1099-R)
- Savings and Investments or Dividends (Form 1099-INT, 1099-OID, 1099-DIV, 1099-B, 1099-S)
- Other Income (including but not limited to)
 - Gambling Winnings (Form W-2G or 1099-MISC)
 - Jury Duty income
 - Alimony payments (spousal support not child support) with ex-spouse's name and SSN

Expenses for Deductions or Tax Credits

- Tuition expenses you or a dependent paid to attend a university, college, or technical school (1098-T)
- Interest paid on student loans (1098-E)
- Day Care expenses you paid for dependent children (statement with provider's name, address, tax ID number, and amount received for each child)
- Educator Expenses – For Teachers, Administrators, Aides working in K-12 schools

- Health Insurance purchased from the marketplace (Form 1095-A)
- Health Savings Account (Form 5498-SA or 1099-SA)
- Home Ownership
 - Mortgage interest (Form 1098)
 - Property Tax Bill
 - Energy-Saving Home Improvements
- Medical Expenses
 - Medical Insurance, Dental Insurance or Long-Term Health Care premiums
 - Amounts paid to doctors, dentists and hospitals

Minnesota Residents

- Receipts for education expenses you paid for your dependents in grades K-12, such as tutoring, rental/purchase of instruments, school supplies, computer software or hardware
- Total amount paid on student loans and the original loan amount
- Rent/Property Tax Rebate
 - Annual Benefits for Minnesota Family Investment Program (MFIP), Minnesota Supplemental Aid (MSA), General Assistance (GA), and Minnesota Housing Support (*formerly GRH*), Supplemental Security Income (SSI), veteran's benefits, or worker's compensation, Diversionary Work Program (DWP), Emergency Assistance, canceled debt, foster care payments
 - For Renters
 - Certificate of Rent Paid
 - For Homeowners
 - Property tax statements 2023 (bring 2022 and CAD will download when 2023's are posted in March)
 - Income of other people living in the home that are not on your tax return
 - For Mobile Homeowners
 - Certificate of Rent Paid
 - Property tax statements 2023 (bring 2022 and CAD will download when 2023's are posted in June)
 - Income of other people living in the home that are not on your tax return

Wisconsin Residents

- County, School District and Municipality
- Rent paid in tax year with heat, rent paid without heat, and property tax paid
- Private tuition payments for K-12 schools with school name/address, grade of child and amount
- Wisconsin capital loss carryover (or previous year Wisconsin tax return)
- Homestead credit
 - Annual Benefits for Supplemental Security Income (SSI), Supplemental Security Income – Exceptional expense (SSI-E), Social Security Disability (SSD) and Caretaker Supplement payments (CTS), Wisconsin Works (W2), county relief, kinship care or any other cash public assistance
 - Annual benefits for veteran's benefits, or worker's compensation
 - Child support
 - Income of non-resident spouse or part-year resident spouse