

free

TAX PREP



Summer tax prep begins June 7, 2021!

TAX SERVICES

Federal taxes
Minnesota state taxes
Self-employment taxes
ITIN application + renewal

Renter's refund
Homeowner's refund
Prior year returns

FINANCIAL SERVICES

U.S. savings bonds
FAIR checking, savings, +
credit builder accounts
Prepaid debit cards

Credit report review
Financial counseling
Financial coaching

ANNUAL INCOME QUALIFICATIONS

Individuals: \$35,000 or less

Families: \$55,000 or less

Self-employed: \$55,000 or less

SCHEDULE AN APPOINTMENT

Appointments are required and scheduled up to 2 weeks in advance. Due to COVID-19, all tax prep will be drop-off only.

- Schedule an appointment online or by phone. Appointments last 30-45 minutes.
- During drop-off, your documents will be uploaded to a secure online platform then returned to you.
- Taxes are prepared at a later time.
- Once notified, you'll return to sign and pick up your completed tax return(s).

Call or visit our website to make an appointment!



651-287-0187

prepareandprosper.org

Prepare + Prosper

2610 University Ave. W. Suite 450 + LL
St. Paul, MN 55114

TAX PREPARATION CHECKLIST.....

Bring the documents below. If you have questions call 651-287-0187.

1. Personal Information

- Picture **ID**
- Birthdate** for all persons listed on the tax return
- Social Security card** or **Individual Tax Identification Number (ITIN)** card or letter for all persons listed on the tax return
- Routing and account numbers** for your savings account, checking account, and/or prepaid card

2. Year-End Income Statements

- W-2s** for each job
- 1099** forms for retirement, Social Security, unemployment, interest, dividends, stock sales, and miscellaneous income
- Year-end amounts** for MFIP, SSI, MSA, GA, veterans' benefits, workers' compensation

3. Education and Child Care Credits

- Record of **educational expenses** you paid for your children in grades K-12
- Tuition expenses** paid for you or your child to attend a college or university (Form 1098-T)
- Student loan **interest statement** (Form 1098-E)
- Child care expenses:** Provider name, address, and tax ID or Social Security number

4. Property Tax Refunds and Deductions

- Homeowners:** Mortgage interest and real estate taxes paid in 2018 and 2019 Property Tax statement
- Renters:** Certificate of Rent Paid (CRP)

5. Additional Documents

- Previous year's **tax return**
- Verification of **health insurance** if purchased through MNsure (Form 1095-A)
- Record of charitable **donations**

**We aren't able to do your taxes if you have income from driving a cab, rental income, or filed bankruptcy in the tax year you wish to file. There are also other, less common situations that are out of scope. If you are unsure whether we can do your taxes, please give us a call at 651-287-0187.*