



**DEPENDENT INFORMATION - (if you don't have dependents you can skip to "INCOME" section)**

NOTE: A dependent who is over 18, not in school, and whose income is less than \$5,050 can still be claimed by you.

YES NO

Did you adopt any dependents during the year? Adoption expenses \$ \_\_\_\_\_

Will you be claiming the same dependents as the previous tax year? \_\_\_\_\_

If "No", complete entire line for each dependent you will be claiming. (19-23)

First and Last Name	SSN	Relationship	Months in home	Date of Birth	Disabled	Full-time Student
			8332			
			8332			
			8332			
			8332			

Can you provide documentation to substantiate eligibility for and the amount of the credits claimed on the tax return? (Child Tax Credit, Earned Income Credit, Other Dependent Credit, Education Credits, etc.)

If "Yes", what forms of proof can you provide: (CIRCLE ALL THAT APPLY)

SCHOOL HEALTHCARE MEDICAL DAYCARE OTHER: \_\_\_\_\_

Would you like to elect to receive advance payment of your 2025 Minnesota child tax credit?

Do you want the advance payments direct deposited?

**SAME**

If "Yes", bank name: \_\_\_\_\_ Checking \_\_\_\_\_ Savings \_\_\_\_\_

Routing # \_\_\_\_\_ Account # \_\_\_\_\_

- \$1,750 per child under 18 at the end of 2025  
\$291.67 per child (50% of Credit)  
Paid in 3 installments (July, September & November)
- No maximum number of children
- Combined with the Working Family Credit, then phased out
- Reduced by 12% of amount above income thresholds

**PAYMENTS WILL AFFECT SNAP BENEFITS**

Income – Greater of earned income or AGI

- Less than \$36,880 for MFJ
- Less than \$31,090 all others
- Phase out begins above these thresholds

Did you have any childcare expenses during the year? Amount \$ \_\_\_\_\_ flexed on W-2

Daycare FEIN or SS# \_\_\_\_\_ Name: \_\_\_\_\_

Address: \_\_\_\_\_

Did you have any K-12 required school expenses? (you will need to provide receipts to IRS if audited)

If "Yes", please complete spreadsheet below.

K-12 REQUIRED SCHOOL EXPENSES	CHILD 1	CHILD 2	CHILD 3	CHILD 4
Name of Student				
Grade in May 2024				
Public, Private or Homeschool				
Enrichment Outside School: (must be academic in nature)				
Organization				
Class Type				
Individual Instruction: tutor, driver's ed, piano, instrument				
Instructor/Organization				
Class Type				
Required School Expenses:				
Calculator/Paper/Pencils/Etc.				
Purch/Rent Musical Instrument				
Computer Hardware/Software				
Private School Name				
Private School Tuition				

## INCOME

YES NO

- W-2's \_\_\_\_\_
- Gambling winnings (Form W2 G) \_\_\_\_\_
- Pension or IRA distributions (Form 1099-R) \_\_\_\_\_
- Did you or your spouse contribute to a pension without contributing to social security at the same time?  
If "Yes", were you a basic member? \_\_\_\_\_ YES \_\_\_\_\_ NO
- (Income limits for MN Public Pension Subtraction: Single AGI \$101,190 and Married AGI \$124,380)**
- Dividends received (Form 1099-DIV) \_\_\_\_\_
- Interest received (Form 1099-INT) \_\_\_\_\_
- Sales of stock, investments, land, etc. (Form 1099-B) \_\_\_\_\_
- Unemployment benefits (Form 1099-G) \_\_\_\_\_
- Miscellaneous income (Form 1099-MISC) \_\_\_\_\_
- Non-Employee Compensation (Form 1099-NEC) \_\_\_\_\_
- Social Security benefits (Form SSA-1099) \_\_\_\_\_
- Cancellation of debt (Form 1099-C) \_\_\_\_\_
- Did you file an Iowa tax return last year? (answer only if we did NOT do your taxes last year)  
If "Yes", what was your Federal refund amount? \$ \_\_\_\_\_
- Did you receive, sell, send, or exchange any virtual currency? (cryptocurrency, bitcoin)
- Did you own property, receive income, pay taxes or have financial interest/authority in a foreign country?
- Alimony received: Date of divorce: \_\_\_\_\_ amount received: \$ \_\_\_\_\_
- Schedule K-1's from any Partnerships, LLC, LLP, trust or S-corporations \_\_\_\_\_
- Other income (jury duty, prizes, scholarships, etc.) Explain: \_\_\_\_\_
- Proceeds from real estate transactions (Form 1099-S) Description: \_\_\_\_\_  
Date Acquired: \_\_\_\_\_ Date Sold: \_\_\_\_\_ Purchase Price: \_\_\_\_\_  
Improvements: \_\_\_\_\_ Expense of sale: \_\_\_\_\_  
Was it your primary home? Yes No If yes, how days did you own/use home in last 5 years? \_\_\_\_\_

## NON-TAXABLE INCOME – needed for property tax refund

- Supplemental Security (SSI) \$ \_\_\_\_\_
- MN Family Investment Program (MFIP) \$ \_\_\_\_\_
- MN Supplemental Aid (MSA) \$ \_\_\_\_\_
- General Assistance (GA) \$ \_\_\_\_\_
- Worker's Compensation: \$ \_\_\_\_\_
- Sick Pay \$ \_\_\_\_\_

## ADJUSTMENTS TO INCOME

- For Teachers: Education expenses for classroom supplies up to \$300.  
If "Yes", Taxpayer \$ \_\_\_\_\_ Spouse \$ \_\_\_\_\_
- Did you contribute any amount to a Health Savings Account (HSA) outside of work during the year?  
Taxpayer \$ \_\_\_\_\_ Spouse \$ \_\_\_\_\_ Type of Plan? YOURSELF FAMILY  
**(Max contributions: Yourself \$4150, Family \$8300 and between age 55-65 an additional \$1000)**
- Did you receive any distributions from a Health Savings Account (HSA) during the year?  
Taxpayer \$ \_\_\_\_\_ Spouse \$ \_\_\_\_\_ was it all used for medical? YES NO
- Alimony Paid  
If "Yes", name: \_\_\_\_\_ SS# \_\_\_\_\_ Divorce date \_\_\_\_\_ Amt \$ \_\_\_\_\_
- Student loan interest paid  
If "Yes", Taxpayer \$ \_\_\_\_\_ Spouse \$ \_\_\_\_\_ Dependent(s) \$ \_\_\_\_\_  
Original Loan Amount \$ \_\_\_\_\_ Amount paid for the year \$ \_\_\_\_\_
- Have you had any student loans forgiven?  
If "Yes", how much was forgiven? \$ \_\_\_\_\_
- Did you make any contributions to a Traditional IRA during the year? (Deductible)  
If "Yes", Taxpayer \$ \_\_\_\_\_ Spouse \$ \_\_\_\_\_
- Did you make any contributions to a ROTH IRA during the year? (Non-Deductible)  
If "Yes", Taxpayer \$ \_\_\_\_\_ Spouse \$ \_\_\_\_\_  
**(Max contribution combined for Traditional and Roth is \$7000, age 50+ is \$8000)**

## CREDITS

YES NO

[ ] [ ]

Did you make a contribution to or receive a distribution from an Education Savings Account, Qualified Tuition Program or 529 Plan during the year?

If "Yes", Plan Trustee: \_\_\_\_\_ Account # \_\_\_\_\_

Contribution Amount \$ \_\_\_\_\_ Distribution amount \$ \_\_\_\_\_

[ ] [ ]

Did you pay tuition expenses that were required for attending a college, university, or vocational school for yourself, your spouse, or a dependent during the year? BRING FORM 1098-T

Taxpayer \$ \_\_\_\_\_ Spouse \$ \_\_\_\_\_ Dependent(s) \$ \_\_\_\_\_

[ ] [ ]

Did you purchase required books? Cost of books (first 4 years of school only) \$ \_\_\_\_\_

[ ] [ ]

Did you receive grants and scholarships? \$ \_\_\_\_\_

How many years have you used the American Opportunity Tax Credit? (AOTC) 1 2 3 4

[ ] [ ]

Did you make any energy-efficient improvements to your main home during the year?

Solar Electric \$ \_\_\_\_\_ Solar Water \$ \_\_\_\_\_ Wind Energy \$ \_\_\_\_\_

Tax credit is  
30% of  
project cost  
up to max  
amounts

Geothermal Heat Pump \$ \_\_\_\_\_ Qualified Battery Storage: \_\_\_\_\_

Insulation (max \$1,200) \$ \_\_\_\_\_ Exterior Doors (max \$500, \$250 per door) \$ \_\_\_\_\_

Windows (max \$600) \$ \_\_\_\_\_ A/C (max \$600) \$ \_\_\_\_\_

Gas/Propane/Oil Water Heater (max \$600) \$ \_\_\_\_\_

Gas/Propane/Oil Furnace or Hot Water Boiler (max \$600) \$ \_\_\_\_\_

Improvement or Replacement of panelboard, circuits or feeders (max \$600) \$ \_\_\_\_\_

Home Energy Audit (max \$150) \$ \_\_\_\_\_ Electric/Gas Heat Pump (max \$2,000) \$ \_\_\_\_\_

Electric/Gas heat pump water heater (max \$2,000) \$ \_\_\_\_\_ Biomass Stove/Boiler (max \$2,000) \$ \_\_\_\_\_

[ ] [ ]

Did you purchase a NEW hybrid, alternative motor, or electric motor energy-efficient vehicle?

If "Yes", date purchased: \_\_\_\_\_ Year: \_\_\_\_\_ Make: \_\_\_\_\_ Model: \_\_\_\_\_

VIN # \_\_\_\_\_

[ ] [ ]

Did you make any estimated payments toward your 2024 taxes?

Date: \_\_\_\_\_ Federal \$ \_\_\_\_\_ State \$ \_\_\_\_\_

Date: \_\_\_\_\_ Federal \$ \_\_\_\_\_ State \$ \_\_\_\_\_

Date: \_\_\_\_\_ Federal \$ \_\_\_\_\_ State \$ \_\_\_\_\_

Date: \_\_\_\_\_ Federal \$ \_\_\_\_\_ State \$ \_\_\_\_\_

[ ] [ ]

Did you apply an overpayment of your 2023 taxes to your 2024 estimated taxes?

Federal \$ \_\_\_\_\_ State \$ \_\_\_\_\_

[ ] [ ]

If you have an overpayment of 2024 taxes do you want the refund applied to your 2025 estimated taxes?

## HOMEOWNERS

[ ] [ ]

Did you own and occupy your home on January 2, 2025?

If "Yes", you may be eligible for a Minnesota Property Tax Refund based on your income and the amount you pay in property taxes. Bring your 2025 Property Tax Statement and we will check.

[ ] [ ]

Did any adults live with you that were not your spouse, dependent, parent or a renter?

If "Yes", name(s) \_\_\_\_\_ Total Income: \$ \_\_\_\_\_

[ ] [ ]

For the Special Refund, did you own and occupy your home on January 2, 2024 AND January 2, 2025?

[ ] [ ]

Do you use the office in the home deduction for your business or self-employment income?

[ ] [ ]

Were you born after January 2, 1960 and considered disabled by the Social Security Administration?

## RENTERS

**Starting with your 2024 taxes, you claim the Renter's Credit as part of your Minnesota Individual Income Tax return. It will be part of the amount owed or refund. You will no longer file a Renter's Property Tax Refund return. This means renters who previously filed both returns will not receive a separate refund later in the year.**

[ ] [ ]

Are you a Renter?

If "Yes", you may be eligible for a Minnesota Rent Credit Refund based on your income and rent paid. Bring your 2024 Certificate of Rent Paid, provided by your landlord and we will check.

[ ] [ ]

Were you born after January 2, 1960 and considered disabled by the Social Security Administration?

[ ] [ ]

Does Certificate of Rent Paid form have ECN certificate number/ barcode at top right?

If "No", we cannot file without.