

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 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 \$ _____

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.

ITEMIZED DEDUCTIONS - Standard Deduction for Federal

Single: \$14,600 Age 65 and older or blind ADDITIONAL deduction: \$1,950
Married Filing Joint: \$29,200 Age 65 and older or blind ADDITIONAL deduction: \$1,550
Married Filing Separately \$14,600 Age 65 and older or blind ADDITIONAL deduction: \$1,550
Head of Household: \$21,900 Age 65 and older or blind ADDITIONAL deduction: \$1,950

***Can use on state side even if not itemizing on federal**

MEDICAL & DENTAL (IS OVER 7.5% OF INCOME)

Pre-Taxed Self Employed

***HEALTH INS PREMIUMS** _____

Medicare _____ Part D _____

IA (can use in IA if over 65 and under \$100,000 of income)

MN *LONG TERM CARE

Ins. Co. Name: _____

Premium: His/ _____ Hers/ _____

Policy #'s: His/ _____ Hers/ _____

Medical Miles@.21/mile

Miles _____ \$ _____

Other medical & dental expenses (out of pocket)

Prescriptions _____

Dr/Hospital _____

Hearing Aids _____ Glasses _____

Chiropractor _____ Dental _____

Medical Supplies _____

Nursing Home Exp: His/ _____ Hers/ _____

TAXES YOU PAID – Max of \$10,000

State tax paid in 2024 for 2023 _____

General sales tax vehicle purchased _____

Real Estate 1st Home _____ 8829

2nd Home _____ 8829

Personal Property (Auto Tabs)

1st _____ 2nd _____

3rd _____ 4th _____

INTEREST TAXPAYER PAID

Refinance Expense (bring closing forms)

Home mortgage interest & points (1098)

1st _____ 2nd _____

Motorhome interest _____

Home Equity Loan Int (used for home) _____

Home mortgage interest not on 1098

(contract for deed)

Paid to name: _____

Soc Sec#: _____

Amount paid: _____

Points/Origination Fees _____

***GIFTS TO CHARITY (RECEIPTS REQUIRED)**

MN Church _____

Charity _____

Charitable Miles

MN .14/mile _____ \$ _____

IA .14/mile _____ \$ _____

Charitable property _____

OTHER MISCELLANEOUS

Gambling Loss _____

Ordinary Losses _____

Annuity or Roth loss _____

MN ITEMIZING W-2 EMPLOYEE NOT REIMBURSED BY EMPLOYEE

Miles @.67/mile

Miles _____ \$ _____

Overnites _____ Per diem \$55/day _____

Unreimbursed Tools _____

Unreimbursed Clothing/boots/gloves _____

Unreimbursed Motels _____