



HOW TO PREPARE FOR TAX SEASON

Taking some time to get organized now will help ensure a smooth tax prep experience, no matter where you get your taxes done this year.

In partnership with MAA, Amana Financial Services is offering free tax prep services to the first 550 MAA families that sign up. To sign up, visit [www.mnafterschool.org/taxprep](https://mnafterschool.org/taxprep) starting January 9.

Amana wants to ensure your tax are done correctly, including helping you accurately claim the MN K-12 Education Tax Credit and get you the maximum refund.

In order to do that, we'll need you to collect all of the necessary documents and provide them to Amana Financial via their online portal or in-person appointment. Further instructions will be shared with families who sign up, but you can start getting organized right away!

Please use the checklist below to prepare for filing your taxes. As you receive important tax documents, check the boxes so you know when you're ready to file. Consider keeping the green envelope we sent this packet in and use it to keep copies of all of the documents on this list. That way when it comes time to share these documents with your tax preparer it's all in one place!

Even if you don't use Amana Financial Services this year, this tool may still come in handy to help you get organized for the tax filing season.

Tax Preparation Checklist

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. If you're receiving a refund, we'll use this information to tell the IRS where to deposit it.

2. YEAR-END INCOME STATEMENTS

- W-2s** for each job you held in 2022

Job 1:

Job 2:

Job 3:

Job 4:



1099 forms for retirement, Social Security, unemployment, interest, dividends, stock sales, and miscellaneous income

- Retirement
- Social Security
- Unemployment
- Interest/Dividends/Stock Sales
- Misc. Income

Year-end amounts for MFIP, SSI, MSA, GA, veterans benefits, workers' compensation.

- | | |
|--------------------------------------|---|
| <input type="checkbox"/> MFIP: _____ | <input type="checkbox"/> Veteran's Benefits: _____ |
| <input type="checkbox"/> SSI: _____ | <input type="checkbox"/> Workers Comp: _____ |
| <input type="checkbox"/> MSA: _____ | <input type="checkbox"/> Other Government Benefits: _____ |
| <input type="checkbox"/> GA: _____ | |

3. EDUCATION AND CHILD CARE CREDITS

Record of **educational expenses** you paid for your children in grades K-12 – including Minnesota forms M1ED, M1REF, and the itemized receipts for services received as a part of your participation in MAA, which were included in the tax mailing you received from MAA in early January.

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

- Provider Name: _____
- Address: _____
- Tax ID or Social Security Number: _____

4. PROPERTY TAX REFUNDS AND DEDUCTIONS

Homeowners: Mortgage interest and real estate taxes paid in 2021, and the 2022 Property Tax statement mailed by the county in March

Renters: Certificate of Rent Paid (CRP)

Mobile home owners: All of the above documents

5. ADDITIONAL DOCUMENTS

Previous year's **tax return**

Verification of **health insurance** if purchased through MNsure (Form 1095-A)

Advanced child tax credit letter

Economic impact payments

Record of charitable **donations**

Once you have collected all of your documents, you're ready to start preparing your taxes!