

# What to Bring?

**\*\* Important:** The IRS will be phasing out paper refund checks. Most tax refunds instead will be delivered via direct deposit. Please bring **banking information** as outlined below.\*\*

## The following documents are required at the time of your appointment:

- **Photo ID** for you (and spouse, if applicable)
- **W-2s** and any information on tips (gratuities) received
- **Social Security or ITIN** (tax ID #) cards (or photocopies) *for all in family (not needed if prior year tax return was done by one of our tax sites (See below \*) AND you bring a copy of the tax return showing all those ITINs and social security numbers)*
- **Banking information:** a voided check or card, bank statement from bank, prepaid debit card (*listing routing number and account number*)
- Copy of **prior year return(s)** - a transcript can be ordered from the IRS at 800-908-9946 or online at [irs.gov](http://irs.gov)
- **IRS Intake forms** which can be found at each site or downloaded [IRS Intake Sheet](#) and [MN Intake Form](#).
- **SSA-1099** – has pink box showing total social security amount for the year before the Medicare subtraction is taken (if lost, call 877-405-3631 to obtain); can also serve as SSN verification
- **Letter from MNDOR** (*mailed in January 2026*) summarizing payments received if you opted in for ADVANCE payments of your TY25 MN Child Tax Credit
- **1099-INT** or information from bank if less than \$10 – bank statement showing total of interest received during the year
- **1099-DIV** – dividends received during the year
- **1099-R** – IRA or pension retirement income for the year
- **1099-G** – unemployment compensation received

If filing for **MN rent or homestead credit** refund, documentation of total of nontaxable income received during the tax year, such as:

- **SSI** (Supplemental Security Income); if you don't have a letter showing total for tax year, go to the Social Security office (206 Broadway Ave S, Suite 600 in Rochester) or call 877-405-3631 to have a letter mailed to you
- **County cash assistance**; if the letter you received in January showing the total of cash benefits received during the year is lost, call county case worker for a copy
- **Veterans Benefits**
- Scholarships – also need this info on a **1098-T** if want to apply for education credit
- If a homeowner and want to file for a **MN M1PR Homestead Credit Refund**, income of other person(s) living in the home (unless they are a dependent or parent)

## Other:

- Any other income of any kind received during the year: election worker, gambling winnings, etc.
- Charitable contributions made during the year for contributions over \$500 may qualify for a state deduction
- If itemizing, real estate (homeowner) taxes paid, medical expenses, health insurance paid, charitable donations

- Closing statement if bought or sold a home
- Certificate of rent paid forms received from landlord for current tax year
- Property tax statement for taxes payable in 2026 (if a homeowner)
- Health Insurance information if purchased through MNsure (need **Form 1095-A**)
- Any Power of Attorney or other document giving authority to file for another

**New provisions for tax year 2025 and info needed:**

- A portion of qualified tips are not subject to income tax. Tips Info may not be shown on your W2. Bring details of tips received and if reported on your W2. This may apply to occupations where tips are customarily received such as servers and taxi drivers.
- Overtime may not be subject to income tax. This will not be disclosed on your W2 form so bring support such as paystubs or an employer statement regarding overtime. Only the “half premium” and overtime worked in excess of 40 hours a week qualifies.
- New interest expense deduction on loans used to purchase new cars in 2025. Not all vehicles qualify and you will need to provide the VIN Identification number (often found on your insurance card) and the amount of the interest paid.

**\*Tax Sites:**

125 Live, Salvation Army, Bethel Lutheran Church, Stewartville Center for Active Adults, Mantorville Senior Center, Sylvan Manor, Mower County Senior Center

All income and expense information should be for **2025 tax year**  
and/or prior tax year(s) if you need a return done for prior year(s)