



FREE TAX PREPARATION SERVICES

What do I need to bring with me?

Required Documents

IDENTIFICATION

- **Photo ID**
- **Social Security card or Individual Tax Identification Number (ITIN)**
- **Birthdates and Social Security cards for everyone** listed on the tax form

INCOME / PUBLIC BENEFIT STATEMENTS

- **All 2024 Income Statements: W2s, W2G, o 1099-R y 1099-NEC**
- Year-end income for additional benefits **(MFIP, SSI, MSA, GA, etc.)**

ADDITIONAL DOCUMENTS

- Last year's Tax Returns
- **Direct deposit** information (voided check or routing & account number)

Credits and Deductions

EDUCATION CREDITS & ADJUSTMENTS

- Receipts for dependents' **K-12 educational expenses**
- Tuition expenses for higher education **(1098-T)**
- Interest paid on student loans **(1098-E)**

CHILD EXPENSES

Provider name, address, Social Security number, ITIN or Tax ID

ITEMIZED DEDUCTIONS

Receipts and proof for charitable donations, medical expenses, and Mortgage interest statement **(Form 1098)**

PROPERTY TAXES

- **Owner:** 2024 Property Tax Statement
- **Renter:** Certificate of Rent Paid **(CRP)**
- **Mobile Home Owner:** Property Tax Statement, Certificate of Rent Paid

It is required to provide **ID** for every taxpayer and **Social Security Cards or ITINs** for **ALL** dependents.

Alternative documents will not be accepted

INCOME LIMITS: \$67,000.00 or less

Ask about our **Economic Prosperity** programs offered at CLUES
We can help you achieve your financial goals!

The services offered follow IRS VITA program requirements
Limitation of services may apply
Services made available through a grant provided by the State of Minnesota

