



FREE TAX PREPARATION SERVICES

*FY2025

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 2025 Income Statements: W-2, W-2G, or 1099-R and 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, tax ID, or Social Security number

ITEMIZED DEDUCTIONS

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

PROPERTY TAXES

- Owner: 2026 Property Tax Statements and Mortgage Interest Paid (Mid March)
- Renter: Certificate of Rent Paid (CRP)



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

Alternative documents will not be accepted.

INCOME LIMITS: \$69,000 or less

ARE YOU RECEIVING A REFUND OR OWE ADDITIONAL TAXES? Ask about our **Economic and Housing Stability programs** offered at CLUES. **We can help you achieve your financial goals!**

The services offered follow IRS VITA program requirements. Limitations of services may apply.

Service made available through a grant provided by the State of Minnesota.

