

The Tax-Aide counselor must have the following to file your 2018 return:

- Please arrive **30** minutes early to complete a **NEW 7-page intake form BEFORE your tax returns can be prepared.**
- Photo ID for each taxpayer (joint returns require both spouses to be present to sign)
- Social Security, ITINs, and/or Medicare cards for each person listed on the tax return. A Social Security statement displaying the taxpayer's SS# is acceptable.
- A copy of the 2017 tax return(s)
- All 2018 tax-related documents including
 - *Income related documents:* Forms W2, Unemployment Compensation, SSA 1099, 1099-R, 1099-INT, 1099-DIV, and any self-employment income. If you receive a pension or annuity from a former employer, please bring the date that you began to receive payments (in some cases, this is required)
 - *Charitable contribution documents* if contributions equal \$500 or more
 - *Long term care premium documents*
 - *Health care coverage:* W-2, SSA 1099, Form 1095A, or Exemption Cert. #
- Education expense documents: Form 1098-T from the institution and receipts for other education expenses. For K-12 students, bring receipts for a. educational software, b. private school tuition, c. Tutoring, d. academic books/materials, e. music lessons and music equipment purchases or rentals, f. tuition for academic school camp, g. instructor's fees for driver's ed., h. school supplies (pencils, notebooks, etc.)
- A checkbook or blank check to verify bank account and routing numbers (if requesting direct deposit or debit)
- For renters: the signed 2018 Certificate of Rent Paid (CRP). If you own your mobile home but rent the lot, you **MUST** wait for your **2019 Property Tax Statement** (typically issued in mid-summer for Rice County). CRP for lot rental cannot be filed alone if you own the home.
- For homeowners returning in April for MN Property Tax Day: the 2018 **and** 2019 statements of Property Tax Payable (typically mailed in March for Rice County).

The Faribault program is unable to accommodate taxpayers with the items listed below. These taxpayers may schedule an appointment at Another Tax-Aide site (ATA) or with a professional tax preparer (PTP).

- NO brokerage statements, Form 1099-B, showing stock-type transactions. Brokerage statements that include Form 1099-INT and/or Form 1099-DIV (but no Form 1099-B) are acceptable.
- NO farm income, Form 1040 Schedule F (see PTP)
- NO patronage dividends, Form 1099-PATR: Taxable Distributions Received from Cooperatives (see PTP)
- NO taxes withheld by another state, i.e., full year residents only (see PTP)