



What to Bring Checklist

We can prepare your 2016, 2017, 2018, 2019 or 2020 tax returns including Minnesota and Wisconsin returns.

Personal Information

- Valid photo I.D. for yourself and spouse (if any)
- Social Security Card or document issued by the Social Security Administration for all persons listed on your return.
- Birth dates for all persons on the return
- Identity Protection PIN, if one has been issued to you, a spouse or a dependent by the IRS
- Amount received in stimulus payments in 2020, also known as Economic Impact Payment (EIP)
- Bank routing and account number for direct deposit, if you choose
- E-mail address (for signing digitally)
- Previous year tax return if you did not have your return done at CAD

Sources of Income

- Employed - Wages from each job (Form W-2)
- Self-Employed
 - Income - Form 1099-NEC, 1099-MISC, Schedule K-1, and Cash payments
 - Expenses – including business mileage
- Unemployment (Form 1099-G)
- Retirement Income
 - Social Security (Form SSA-1099)
 - Retirement plan distributions (Form 1099-R, CSF 1099-R or CSA 1099-R)
 - Railroad Retirement (Form RRB 1099 and RRB 1099-R)
- Savings and Investments or Dividends (Form 1099-INT, 1099-OID, 1099-DIV, 1099-B, 1099-S)
- Other Income (including but not limited to)
 - Gambling Winnings (Form W-2G or 1099-MISC)
 - Jury Duty income
 - Alimony payments (spousal support not child support) with ex-spouse's name and SSN

Expenses for Deductions or Tax Credits

- Tuition expenses you or a dependent paid to attend a university, college, or technical school (1098-T)
- Interest paid on student loans (1098-E)
- Day Care expenses you paid for dependent children (statement with provider's name, address, tax ID number, and amount received for each child)
- Charitable donation amounts of cash or non-cash items
- Educator Expenses – For Teachers, Administrators, Aides working in K-12 schools
- Health Insurance purchased from the marketplace (Form 1095-A)
- Health Savings Account (Form 5498-SA or 1099-SA)
- Home Ownership
 - Mortgage interest (Form 1098)
 - Property Tax Bill

- Energy-Saving Home Improvements
- Medical Expenses
 - Medical Insurance, Dental Insurance or Long Term Health Care premiums
 - Amounts paid to doctors, dentists and hospitals

Minnesota Residents

- Receipts for education expenses you paid for your dependents in grades K-12, such as tutoring, rental/purchase of instruments, school supplies, computer software or hardware
- Total amount paid on student loans and the original loan amount
- Rent/Property Tax Rebate
 - Annual Benefits for Minnesota Family Investment Program (MFIP), Minnesota Supplemental Aid (MSA), General Assistance (GA), and Minnesota Housing Support (*formerly GRH*), Supplemental Security Income (SSI), veteran's benefits, or worker's compensation, Diversionary Work Program (DWP), Emergency Assistance, canceled debt, foster care payments
 - For Renters
 - Certificate of Rent Paid
 - For Homeowners
 - Property tax statements 2021 (bring 2020 and CAD will download when 2021's are posted in March)
 - Income of other people living in the home that are not on your tax return
 - For Mobile Homeowners
 - Certificate of Rent Paid
 - Property tax statements 2021 (bring 2020 and CAD will download when 2021's are posted in June)
 - Income of other people living in the home that are not on your tax return

Wisconsin Residents

- County, School District and Municipality
- Rent paid in tax year with heat, rent paid without heat, and property tax paid
- Private tuition payments for K-12 schools with school name/address, grade of child and amount
- Wisconsin capital loss carryover (or previous year Wisconsin tax return)
- Homestead credit
 - Annual Benefits for Supplemental Security Income (SSI), Supplemental Security Income – Exceptional expense (SSI-E), Social Security Disability (SSD) and Caretaker Supplement payments (CTS), Wisconsin Works (W2), county relief, kinship care or any other cash public assistance
 - Annual benefits for veteran's benefits, or worker's compensation
 - Child support
 - Income of non-resident spouse or part-year resident spouse