

EMPLOYEE BUISNESS EXPENSES (MN ONLY)

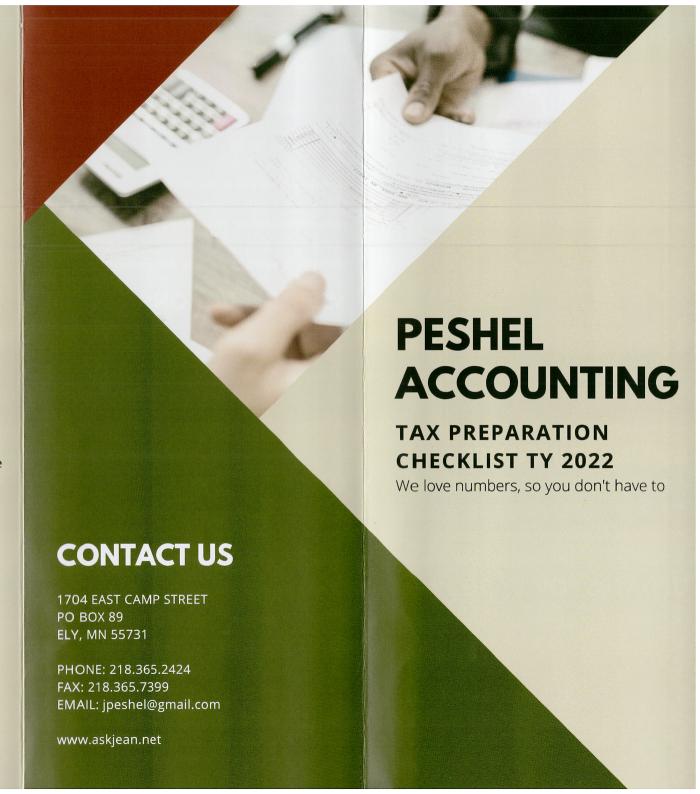
- Union Dues
- Safety Equipment
- Uniforms & Upkeep
- Job-related Continuing Ed
- Job-seeking Expenses
- Job-related Travel Expenses
- Job-required Tools & Equipment

ADDITIONAL INFO FOR MN

- Qualified School Expenses for K-12
- Rent Credit (CRP)
- Property Tax Statement Payable in 2023
- Charitable Contributions if over \$500
- Long-term Care (Nursing Home) Insurance
 Premiums

MISC. INFO NEEDED

- Name, SS#, Birthdates for Spouse & Dependents
- Bank Information for Direct Deposit
- Driver's License or other Photo ID



TYPES OF INCOME

- W-2's from Wages & Salaries
- Interest & Dividends
- Sale of Property or Stocks
- Other Types of Investment Incomes
- Pensions & IRA Distributions
- Social Security
- State or Local Tax Refunds
- Alimony Received
- Unemployment Benefits
- Tip Income
- Gambling & Lottery Winnings
- Prizes & Awards
- Hobby Income
- Jury Duty Pay
- Income from Trusts and Estates

BUISINESS INCOMES

- K-1's from Partnerships & Corporations
- Rental Income & Expenses
- Self-employment Income & Expenses
- 1099-K from Third-Party Payment Apps

UPDATES FOR TY 2022

- Detailed Mileage Report
- MN Frontline Worker Pay (Taxable IRS)
- 1099-Ks from 3rd Party Payers
- Virtual Currency (ex. Bitcoin) ledgers may be needed to determine taxable events.

Important: If you had your health insurance through MNsure, please include form 1095A with your tax information.

The Deadline for Income Taxes this year is April 18, 2023. The Extension Deadline is October 16, 2023.

Reminder: If we did not check to see if you were eligible for a property tax refund based on the property tax statement payable in 2021, please include it with your tax documents

MISC. DEDUCTIONS

- Contributions to IRA's
- Student Loan Interest Paid
- Alimony Paid
- Penalties on Early Withdrawals of Savings
- Health Savings Account Deductions
- Teacher Classroom Expenses

OTHER TAX ITEMS

- Daycare Expenses (Need name, address & SS# of daycare provider.)
- Tuition Expenses for post-secondary
 Education **Books and supplies may
 also qualify this year.
- Adoption expenses Incurred
- Any Documentation related to virtual currencies.

SCHEDULE A DEDUCATION

Please note: Some of these expenses are no longer allowable on the Federal return. However, all these Schedule A expenses are still allowable on the MN return.

Medical

- Insurance Premiums
- Prescriptions
- Doctor, Dentist, Eye Doctor
- Hospital Expenses
- Glasses & Contacts
- Hearing Aids & Batteries
- Other Types of Medical Aids
- Nursing Home Ins. Premiums (name and policy #)
- Out-of-town Lodging
- Transportation & Mileage
- Medically Required Alterations to Home (i.e. ramps, etc.
- Stop Smoking & Weight Loss
- Some Types of Counseling or Therapy.

Other

- Mortgage Interest
- Buy or Sell a Home (bring in closing statement)
- Property Taxes Paid
- Cost of License Tabs
- Charitable Contributions
- Out-of-pocket Volunteer Expenses
- Safety Deposit Rental
- Investment Expenses
- Tax Preparation Fees (including software)
- Gambling Losses
- Sales Tax Paid on Purchase of new vehicle, boat, or building home