MBSC/Minnehaha Business Services Inc.
Tax Planning and Preparation

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WHAT TO BRING TO YOUR TAX PRACTITIONER

INCOME

Yes	N/A	
☐	☐	W-2's
☐	☐	1099-R (Distributions from IRAs/401ks/other Retirement accounts
☐	☐	1099-INT (Interest Income)
☐	☐	1099-DIV (Dividend and Capital Gain Income)
☐	☐	1099-B (Sale of Stocks/Mutual Funds) - Check to see if all sales have cost info
☐	☐	1099-MISC (Self-Employment Income)-**FILL OUT BUSINESS FORM SCHEDULE C**
☐	☐	1099-K (If you accept credit cards, PayPal or drive UBER/LYFT) -
☐	☐	1099-G (Unemployment Income Received)
☐	☐	1099-A/1099C (Cancellation of Debt or Property Foreclosure)
☐	☐	K1 (Income from Partnership, Estate, Trust or S-Corporation)
☐	☐	SSA-1099 (Social Security Income)
☐	☐	Alimony/Spousal Maintenance Received (Divorce decrees before 1/1/2019) **AMOUNT** $___________
☐	☐	Rental Income - **FILL OUT BUSINESS FORM SCHEDULE E**
☐	☐	Did you own or have signature authority over any foreign financial assets (bank, brokerage, etc.) during the tax year? If yes, bring info on foreign investment income and max. values.
☐	☐	Do you have any other sources of income? (bartering, hobbies, sale of property)? If so, please bring information.

DEDUCTIONS/CREDITS

Yes	N/A	
☐	☐	Do you have a new child? - **Bring Social Security card and date of birth**
☐	☐	1098-T (Tuition Statement for College)- **Please ALSO bring billing transcripts showing payments and receipts for other supplies.**
☐	☐	1098-E (Student Loan Interest Paid) - NEW MN CREDIT!
☐	☐	1098 Mortgage Interest Statement
☐	☐	Did you buy, sell or refinance a property this year? **Bring all Settlement/Closing Documents**
☐	☐	Charitable Donations- Bring receipts and itemized lists
☐	☐	Proof that all children live with you - School Tuition, health records or other documents Quarterly Estimated Tax Payments - **Bring list of dates and amounts of each payment made and to which Taxing Agency.**
☐	☐	1095-A if Health Insurance was purchased on an exchange.
☐	☐	MN Long Term Care Insurance & 529 Plans- Bring Account numbers and amounts paid MN K-12 Education Expenses - See K-12 Education Credit and Subtraction in our Taxpayer Resources page.

OTHER IMPORTANT ITEMS

Yes	N/A	
☐	☐	**FOR NEW CLIENTS**: Copy of last year's taxes
☐	☐	Copy of Taxpayer and Spouse's Drivers Licenses
☐	☐	HSA information - 1099SA (Draws for the year) and form 5498 (Balance at year end)
☐	☐	**FOR 2020 ONLY: Notice 1444** - form that shows the amount of the recipient's Economic Impact Payment (EIP)