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## PREPARE YOUR DOCUMENTS

### 1. Personal Information

- Picture **ID**
- Birthdate** for all persons listed on the tax return
- Social Security card** or **Individual Tax Identification Number** (ITIN) card or letter for all persons listed on the tax return
- Routing and account numbers** for your savings account, checking account, and/or prepaid card

### 2. Year-End Income Statements

- W-2s** for each job
- 1099** forms for retirement, Social Security, unemployment, interest, dividends, stock sales, and miscellaneous income
- Year-end amounts** for MFIP, SSI, MSA, GA, veterans' benefits, workers' compensation

### 3. Education and Child Care Credits

- Record of **educational expenses** you paid for your children in grades K-12
- Tuition expenses** paid for you or your child to attend a college or university (Form 1098-T)
- Student loan **interest statement** (Form 1098-E)
- Child care expenses:** Provider name, address, and tax ID or Social Security number

### 4. Property Tax Refunds and Deductions

- Homeowners:** Mortgage interest and real estate taxes paid in 2021 and 2022 Property Tax statement mailed by the county in March
- Renters:** Certificate of Rent Paid (CRP)
- Mobile home owners:** All of the homeowner and renter documents listed above

### 5. Additional Documents

- Previous year's **tax return**
- Verification of **health insurance** if purchased through MNsure (Form 1095-A)
- Record of charitable **donations**

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U.S. POSTAGE PAID  
TWIN CITIES, MN  
PERMIT NO. 26854

PREPARE + PROSPER

2610 UNIVERSITY AVE. W. SUITE 450  
ST. PAUL, MN 55114

# free TAX PREP

with us **free** means **free**

January 29 - April 18, 2022



IRS-certified volunteers  
passionate about taxes  
will get you your  
**MAXIMUM REFUND**

Serving the community  
for more than 50 years!

PREPARE + PROSPER

# 1 HOW CAN WE HELP?

## Get your taxes prepared for free

Taxes are prepared by IRS-certified volunteers and double-checked for accuracy. Volunteers prepare federal and Minnesota tax returns, including property tax refunds for renters and homeowners.

## Receive your refund faster

Direct deposit is the fastest and safest way to get your refund. Bring your routing and account numbers to your tax prep appointment, open a prepaid debit card on-site, or contact us to open a checking or savings account before your tax filing process is complete.

## Take a step towards your financial goals

Volunteers will connect you with resources to help you reach your financial goal, whether your goal is increasing savings, boosting credit, or reducing debt.

**More control. Less fees.** Check out FAIR banking—checking, savings, and credit builder accounts.  
**Learn more:**  
[fairfinancial.org](https://fairfinancial.org)

# 2 DO YOU QUALIFY?

## Annual income qualifications:

 Individuals = \$35,000 or less

 Families = \$55,000 or less

 Self-employed = \$55,000 or less

*\*We aren't able to do your taxes if you have income from driving a cab, rental income, filed bankruptcy, or had any transaction involving crypto currency in the tax year you wish to file. There are also other, less common situations that are out of scope. If you are unsure whether we can do your taxes, please give us a call at 651-287-0187.*

# 4 FREE TAX PREP OPTIONS

The health and safety of our customers, staff, volunteers, and community is our priority. P+P is following up-to-date safety guidance from the CDC which, unfortunately, limits our capacity to serve customers.

**Due to COVID-19, all tax prep is by appointment only, no walk-in options available.**

## IN-PERSON DROP-OFF PREP

*Appointments fill quickly but new spots open throughout the season.*

Step 1: Drop off interview. We will go through your documents and paperwork, scan them to a secure online platform and return them to you. This will take about 30-45 minutes.

Step 2: During your first visit, you will schedule a follow-up appointment to finish the process.

Step 3: Your taxes will then be prepared by virtual volunteers who will contact you with questions.

Step 4: At your follow-up appointment, you'll sign and receive your completed tax return(s).

Services are available at eight locations this year.

- CAPI USA, Brooklyn Center
  - Hallie Q. Brown Community Center, St. Paul
  - Hope Community Center, Minneapolis
  - Merrick Community Services\*, St. Paul \*
- \*proof of Covid-19 vaccination required*
- Prepare + Prosper, St. Paul
  - Sabathani Community Center, Minneapolis
  - VEAP, Bloomington
  - Urban League, Minneapolis

 **All locations are wheelchair accessible.**

## SELF-EMPLOYMENT PREP

Self-Employment Tax Prep is available by appointment only using the in-person drop-off model beginning January 31, 2022. Go online to [prepareandprosper.org](https://prepareandprosper.org) or call **651-262-2169** to schedule a self-employment tax appointment if:

- your annual self-employment income is greater than \$6,000,
- you operate a daycare, and/or
- you use your home for your business.



## APPOINTMENT SCHEDULING OPENS JANUARY 19, 2022

*MAKE YOUR APPOINTMENT AFTER YOU HAVE COLLECTED ALL YOUR TAX DOCUMENTS FOR THE YEAR*

**651-287-0187**  
[prepareandprosper.org](https://prepareandprosper.org)

## VIRTUAL TAX PREP

We will have a completely virtual- no in-person meeting- option on a very limited basis this year. Virtual Tax Prep starts with answering a series of questions online, followed by uploading your tax documents to a secure online platform, and later connecting with a volunteer by phone. You would need access to technology. Check the P+P website for more information coming soon.

## DIY TAX PREP

**DIY Tax Prep has unlimited capacity!**

Prepare your own taxes for free with support from Prepare + Prosper! The DIY Tax Prep Guide and weekly online trainings will help you through the process.

This option is available for people with annual incomes under \$73,000 who have access to technology. Visit [prepareandprosper.org/do-it-yourself-tax-prep](https://prepareandprosper.org/do-it-yourself-tax-prep) or use the code to register for a training or request the DIY Tax Prep Guide and the link to the free software.

