

**Bring the following forms to your appointment. Have your W-2 forms, 1099 and social security forms out of the envelopes and grouped together.**

- ✓ Driver's license or other form of picture ID
- ✓ Social security card (s) for each member of your family (Medicare card is acceptable)
- ✓ Last year's tax forms are very helpful to be sure we report everything.
- ✓ If you receive SSI or other assistance be sure to bring evidence of what you received in 2020
- ✓ W-2 forms from every employer you worked for in 2020
- ✓ Unemployment compensation statements for 2020
- ✓ Social security report is **mailed to you in January 2021** (has a pink box with income for 2020 in the box)
- ✓ Interest statements from your banks or other sources of interest or dividends
- ✓ Dependent care provider information if you use day care etc. for children or older adults
- ✓ All of your 1099 R forms from pensions, 1099B for investments, and any other 2020 income sources. If your brokerage statement has more than 6 buy/sell transactions on it we will **not** be able to help you
- ✓ Form 1095 – Healthcare Coverage if you had healthcare through the marketplace
- ✓ If you plan to itemize your deductions and/or claim charitable contributions, organize them on a piece of paper and add them up
- ✓ If you have a small business, you must have less than \$5,000 in expenses. You cannot have any inventory or depreciation. Be sure you bring evidence of income/expenses involved with the business
- ✓ Tuition forms supplied by your college must be able to support expenses against scholarships
- ✓ Any receipts for purchases of school supplies that may be deducted on state taxes
- ✓ If contributions are over \$500, even if you do not itemize, you can deduct ½ of the amount over \$500 from your state taxes. Be sure you have documentation if you are audited
- ✓ If you are a renter (apartment, house or mobile home) you will need the CRP from your landlord for the year 2020. If you live in a **mobile home that you own**, you **CANNOT** file for property tax refund **until your property tax bill arrives in July**
- ✓ **Home owners cannot file for property tax refund until late March when your property tax bill arrives**

***VITA Services are made available through a grant provided by the State of Minnesota.***



Volunteers  
supported by:



**VITA Winona tax preparation procedures will provide maximized safety for clients and volunteers while assuring all standards for the completeness and accuracy of your return are achieved.**

You will be allowed to enter the site only when a volunteer is ready to work with you

You must wear a mask to enter and at all times while at the site

You must use hand sanitizer and have temperature checked upon arrival

Intake process will be conducted at a station equipped with a clear barrier to separate client and volunteer as well as an air purification system

During tax preparation and review, client will be asked to wait in a socially distanced area or you may leave and return in 30-45 minutes

When the return has been completed and reviewed, you will be summoned back to a station for summary discussion and signatures

All of these procedures will be reviewed when calling for an appointment