

# 1 HOW CAN WE HELP?

## Get your taxes prepared at no cost to you

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 prep appointment.


## Take a step towards your financial goals

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

# 2 DO YOU QUALIFY?

## Annual income qualifications:

 Individuals = \$40,000 or less

 Families = \$60,000 or less

*\*We are not 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 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.*

# 3 GATHER YOUR INFO

## 1. Personal Information

- Picture ID** for taxpayer and spouse. If filing jointly, both must be present
- Birthdate** for all persons listed on the tax return
- Social Security card or Individual Tax Identification Number (ITIN)** 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, self-employment, and miscellaneous income
- Year-end amounts** for MFIP, SSI, MSA, GA, veterans' benefits, and 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

- Homeowners:** 2024 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**

# 4 NO COST TAX PREPARATION OPTIONS

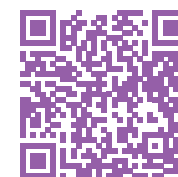
## TAX PREPARATION BY APPOINTMENT\*

### Appointment scheduling starts January 16, 2024.

All tax prep services are in-person and by appointment. **Please allow 2-3 hours for your tax prep appointment.**

**Appointments can be scheduled on our website or by phone.** Scheduling online is the best option as we do experience high call volumes during tax season. Please schedule your appointment AFTER you have collected all of your tax documents. Visit our website for the most up-to-date scheduling information.

651-287-0187  
prepareandprosper.org



## TAX SITE LOCATIONS

- **CAPI USA**, Brooklyn Center
- **East Side Neighborhood Services**, Northeast Mpls.
- **Green Central Elementary**, South Mpls.
- **Hallie Q. Brown Community Center**, St. Paul
- **Merrick Community Services**, East St. Paul
- **Prepare + Prosper Main Office**, St. Paul
- **VEAP**, Bloomington
- **Urban League Twin Cities**, North Mpls

 All locations are wheelchair accessible.

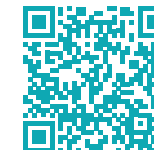
\* A limited number of walk-ins may be accepted if capacity allows. See our website for more details.

## DO-IT-YOURSELF (DIY) TAX PREP

Prepare your own taxes for free with support from P+P! The DIY Tax Prep program is available to you if your 2023 income was \$73,000 or less, and you have easy access to technology. Visit our website to request the software and resources to help you file. You can get support via email and phone or sign up for virtual work time with live support from IRS certified volunteers.

[prepareandprosper.org/do-it-yourself-tax-prep](https://prepareandprosper.org/do-it-yourself-tax-prep)

DIY Tax Prep is a fully virtual option!



## SELF-EMPLOYMENT TAX PREP

Tax assistance is available by appointment for independent contractors and sole proprietors at P+P's main office. Go to [prepareandprosper.org](https://prepareandprosper.org), or call **651-262-2169** to schedule a self-employment tax appointment instead of a regular appointment if one of the following applies:

- Your annual self-employment income is over \$10,000\*
- You operate a daycare, or
- You use your home for your business.

\*Total income, including self-employment income, must meet P+P income qualifications.





# BOOST YOUR MONEY!

## P+P offers free financial services.

We work with trusted partner organizations to help you navigate your financial life with assistance or referrals for:

- Financial planning
- Financial counseling
- Payday loan debt

## Keep more of your money. That's FAIR.

Check out FAIR Banking - checking, savings, and credit builder accounts.

A pathway to financial security and wealthbuilding opportunities.

[FAIRfinancial.org](https://fairfinancial.org)



## Money Mentors: Free Financial Coaching

Get on track with your financial goals through one-on-one coaching and peer group sessions.

[prepareandprosper.org/money-mentors](https://prepareandprosper.org/money-mentors)

## SAVE + WIN! Use tax time to get ahead.

Save at least \$50 of your tax refund and enter to win \$100! Ask your tax preparer for more details.

# NEW + EXPANDED TAX CREDITS IN MN

Along with federal tax credits like the Earned Income Tax Credit (EITC), Minnesota has new and expanded tax credits you may be eligible for this year. **You may still qualify even if you don't usually file a tax return.**

**NEW Minnesota Child Tax Credit:** You can claim up to \$1,750 per child under age 18.

**EXPANDED Working Family Credit:** You can claim up to \$350 for individuals and up to \$2,850 for families.

**EXPANDED K-12 Education Credit:** You can claim this credit for school expenses with income up to \$76,000. Save your receipts!

**Newborn Credit:** You can claim a Child and Dependent Care credit if you had a baby in 2023.

Minnesota also has credits for renters, homeowners, and people paying back student loans.

**Attention ITIN Filers!** All Minnesota tax credits are now available to people filing taxes with an Individual Taxpayer Identification Number (ITIN)! Homeowners with an ITIN now qualify for homestead status and the property tax refund for homeowners. Prepare + Prosper can assist with ITIN applications and renewals.

Go to [prepareandprosper.org](https://prepareandprosper.org) for more tax credit information!

# Get the money you deserve.

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**PREPARE + PROSPER**  
2610 UNIVERSITY AVE. W. SUITE 450  
ST. PAUL, MN 55114

To schedule an appointment,  
call or go online:  
**651-287-0187**  
[prepareandprosper.org](https://prepareandprosper.org)



# no cost TAX PREP

January 23 - April 15, 2024

## Get your taxes done by an IRS-Certified Volunteer!

*Let us help you get your money.*



**PREPARE + PROSPER**

[prepareandprosper.org](https://prepareandprosper.org)