

**"Renter Property Tax Refund"?  
Homestead Credit Refund ?  
K-12 Education Credit ?  
Dependent Care Credit ?**

Date Completed: \_\_\_\_\_

**Welcome to Tax-Aide and thank you for coming.**

Are you filing for a Renter Property Tax Refund or Homestead Credit Refund (for homeowners)?  
Are you filing for a K-12 Education Credit? For Dependent Care Credit (day care)?

If so, please take a moment to look over the following list of possible sources of NONtaxable income or tax deductions, and indicate whether any applied to you in the tax year.

Income from these sources will NOT be added to your taxable income, and will NOT add to either your federal or state income tax bill. But you must include this income as part of your "household income" to correctly figure your renter or homeowner refund credit, K-12 education credit, or dependent care credit.

**Did you have any of the following (please check all that apply)?**

- |  |                          |  |                          |
|--|--------------------------|--|--------------------------|
| Supplemental Security Income (SSI) <sup>In 4</sup>               | <input type="checkbox"/> | Nontaxable pensions/annuities (e.g. Roth) <sup>In 5-&gt;auto</sup> | <input type="checkbox"/> |
| MN Family Investment Program (MFIP) <sup>In 4</sup>              | <input type="checkbox"/> | Nontaxable disability pensions/payments <sup>In 5</sup>            | <input type="checkbox"/> |
| MN Supplemental Aid (MSA) <sup>In 4</sup>                        | <input type="checkbox"/> | Nontaxable personal injury settlement <sup>**/In 5</sup>           | <input type="checkbox"/> |
| General or Emergency Assistance (GA, EA) <sup>4</sup>            | <input type="checkbox"/> | Tax exempt interest & dividends <sup>In 5/fromInt/DivStmt</sup>    | <input type="checkbox"/> |
| Refugee Cash Assistance <sup>In 4</sup>                          | <input type="checkbox"/> | Income excluded by treaty (American Indian) <sup>In 5</sup>        | <input type="checkbox"/> |
| Housing Support (formerly GRH) benefits <sup>In 4</sup>          | <input type="checkbox"/> | Reduction in rent as a caretaker <sup>In 5</sup>                   | <input type="checkbox"/> |
| Diversionsary Work Program (DWP) benefits <sup>4</sup>           | <input type="checkbox"/> | Housing allowance for clergy or military <sup>In 5</sup>           | <input type="checkbox"/> |
| Workers' compensation benefits <sup>**/In 5</sup>                | <input type="checkbox"/> | Nontaxable military pay (e.g., combat pay) <sup>In 5</sup>         | <input type="checkbox"/> |
| Contributions to elective deferral <sup>401K,401b,etc/auto</sup> | <input type="checkbox"/> | Strike benefits <sup>In 5</sup>                                    | <input type="checkbox"/> |
| Contributions to dependent care account <sup>auto</sup>          | <input type="checkbox"/> | Gain on home sale not taxed on Federal <sup>In 5</sup>             | <input type="checkbox"/> |
| Contributions to medical expense account                         | <input type="checkbox"/> | Capital loss carryforward <sup>†/In 5-&gt;&gt;auto</sup>           | <input type="checkbox"/> |
| Employer-paid education expenses <sup>In 5</sup>                 | <input type="checkbox"/> | Health savings account deductions <sup>In 5/auto</sup>             | <input type="checkbox"/> |
| Nontaxable employee transit/parking costs <sup>In 5</sup>        | <input type="checkbox"/> | Nondependent in home (if homeowner) <sup>In 14/Wkt 5</sup>         | <input type="checkbox"/> |
| Veterans' benefits <sup>In 5</sup>                               | <input type="checkbox"/> | Long-term care benefits <sup>**/In 5</sup>                         | <input type="checkbox"/> |
| Nontaxable scholarship, fellowship, grant <sup>In 5</sup>        | <input type="checkbox"/> | Sick pay <sup>**/In 5</sup>  | <input type="checkbox"/> |
| Tuition waivers or reductions <sup>In 5</sup>                    | <input type="checkbox"/> | Alimony to extent not in Federal AGI <sup>†In 5</sup>              | <input type="checkbox"/> |
| Cancelled debt <sup>†</sup>                                      | <input type="checkbox"/> | Home care payments under Medicaid waiver <sup>In 5</sup>           | <input type="checkbox"/> |
|  |                          | Educator Expenses and Tuition & Fees Adjust                        | <input type="checkbox"/> |

\*\* Can exclude to extent can show used funds to pay medical expenses

† To extent reduced Federal Adjusted Gross Income

The following do not need to be included: Dollar value of food/food stamps, clothing and medical supplies received from government agencies, fuel assistance, special needs welfare benefits, Medicare, Medicaid, government assistance medical care (GAMC), childcare assistance or vendored child care payments, mandatory contributions to pension plan (PERA, etc), health & dental insurance paid by employee or employer, premium tax credits, state income tax refunds not included in Federal AGI, MN property tax refund, child support, dependent's income including Social Security, payments from life insurance policies, payments by someone else for care by nurse, nursing home or hospital, IRA or pension/annuity rollovers, gifts and inheritances, reverse mortgage proceeds, and nontaxable Holocaust settlement payments.

**SUPPLEMENTAL QUESTIONS FOR MINNESOTA TAXES**<sup>1/10/20</sup>

Please circle Y(es) where appropriate for the tax year.

**Federal Income Tax Return – Form 1040, Itemized Deductions**

- 1. In 2019, received a 2018 MN Property Tax refund as mobile home or home owner? Y
- 2. Itemized deductions on your 2018 federal tax return? Y

**Minnesota Income Tax Return – Form MN M1**

- 1. Income from another state, other state tax withheld OR moved from another state? Y  
If part-year resident, indicate period of time a MN resident \_\_\_\_\_
- 2. Interest and Dividends – if any, answer questions below:
  - a. Interest from out-of-state municipal bonds? Y
  - b. Interest/dividends from mutual funds investing in bonds from another state? Y
  - c. Net interest or mutual fund dividends from U.S. bonds, bills, or notes? Y
- 3. Military Concerns – if pertinent for you or your spouse, answer a-e:
  - a. Member (or veteran) of the military? Y
  - b. Have 20 years of military service (active and/or reserve component)? Y
  - c. Military pension or other retirement pay from military service? Y
  - d. Service related disability rated as permanent or total? Y
  - e. Active Guard Reserve (AGR)? Y
- 4. Paid any K-12 education expenses for which you have receipts? Y
- 5. Made payments for long-term care insurance? Y
- 6. Licensed teacher completed a master's program started after 6/30/2017? Y
- 7. Made payments on a postsecondary education loan taken out for you or spouse? Y
- 8. Contributed to a Section 529 College Savings Plan? Y
- 9. Have designated a savings account as a First-Time Homebuyer Savings Account? Y
- 10. Made charitable contributions in excess of \$500? Y
- 11. Experience a stillbirth in 2019? Y
- 12. Had a child born in the tax year and are going to file as "Married Filing Joint"? Y
- 13. Made estimated state income tax payments or applied last year's refund to this year's tax? Y

**Minnesota Property Tax (Rent) Refund – Form MN M1PR**

- 1. Paid rent for your personal residence any part of the tax year and have a 2019 CRP? Y
- 2. Owned your personal residence and lived in it as of January 2? Y
  - a. If yes, did any other nondependents live in your home? Y
  - b. Do you have the Property Tax Statement Payable in 2020? Y
- 3. Lived in a mobile home during any part of the tax year? Y
  - a. If yes, did you rent or own the lot? Rent Own
  - b. If yes, did you rent or own the mobile home? Rent Own
  - c. Do you have 2019 CRP(s) and/or Property Tax Statement Payable in 2020? Y
- 4. Made contributions to a retirement account during the tax year? Y
- 5. Had some nontaxable income (**see details on reverse**)? Y