

Supplemental Questions to Ask for 2023 Minnesota Taxes

Please mark the checkbox if a question is applicable for the tax year

Tax Payer: _____

Tennessen Warning (Minnesota Statute 13.04, subdivision 2)

To be read by the preparer before asking these questions:

The information you provide us in your responses is private under state law. We may provide it to certain other government entities if allowed by law. We use this information to create income tax returns and to help determine your eligibility for tax refunds. Participation in this program is voluntary. You are not required to provide the information requested, but we are unable to prepare your tax returns unless you provide us complete information.

Federal Income Tax Return — Form 1040, Itemized Deductions

- Itemized deductions on your 2022 federal tax return?
 - Received a 2022 MN Property Tax refund as a Homeowner or Mobile Homeowner?
 - What was the amount of the 2022 MN Property Tax refund? _____

Minnesota Income Tax Return — Form M1 — please be prepared to provide information details

- Income from another state, other state tax withheld OR moved from another state?
- Work and live on American Indian Reservation of which you are an enrolled member?
- Military-related Items – if pertinent for you or your spouse:
 - Member or Veteran of the military?
 - Have 20 years of military service (active and/or reserve component)?
 - Military pension or other retirement pay from military service?
 - Service-related disability rated as permanent or total?
 - Active Guard Reserve (AGR)?
- Made charitable contributions (cash and/or non-cash) in excess of \$500?
- Paid any K-12 education expenses for which you have receipts?
- Received pension income based on prior Public Service employment which was not covered by Social Security
- Received a Special (one-time) Tax Rebate from MN for TY21?
- Experienced a stillbirth in 2023?
- Had a child born in the tax year?
- Licensed teacher completed a master's program started after 6/30/2017?
- Made payments on a post-secondary education loan taken out for you or spouse?
- Contributed to a Section 529 College Savings Plan?
- Took distributions from a Section 529 College Savings Plan?
- Have designated a savings account as a First-Time Homebuyer Savings Account?
- Made payments for long-term care insurance?
- Made estimated MN income tax payments or applied last year's refund to this year's tax?
- Wish to contribute to the Minnesota Nongame Wildlife Fund? If so, how much? _____

Minnesota Property Tax (Rent) Refund – Form M1PR

- Received non-taxable program payments (SSI, MFIP, MSA, GA, EA, DWP, MN Housing Support)?
- Paid rent for your personal residence any part of the tax year and have a 2023 CRP?
- Owned your personal residence and lived in it as of Jan 2, 2024?
 - Other non-dependent adults lived in your home?
 - If yes, complete the Co-Occupant Income Worksheet
 - Do you have the *Property Tax Statement Payable in 2024* (not estimated form)?
 - Did you file as a Home Owner in 2022 and receive a "special refund" on line 38?
- Lived in a mobile home during any part of the tax year?
 - If yes, did you rent or own the lot? Rent Own
 - If yes, did you rent or own the mobile home? Rent Own
 - Do you have 2023 CRP(s) and/or Property Tax Statement Payable in 2024?