PREPARE + PROSPER

TAX INTAKE SHEET

Preferred name(s): _____ (Taxpayer) _____ (Spouse)

What tax returns do you need prepared? *Check all that apply.*

- ☐ 2021 income taxes
- ☐ 2021 renter or homeowner refund
- ☐ Prior year(s): _____
- ☐ Other: _____

TAXPAYER SURVEY

A. How do you identify?

- ☐ African
- ☐ African American or Black
- ☐ American Indian or Alaskan Native
- ☐ Asian or Pacific Islander
- ☐ Hispanic or Latino
- ☐ Middle Eastern/North African
- ☐ White, Non-Hispanic
- ☐ Multiracial
- ☐ Not listed above, write in: _____

B. Are you or a member of your household considered a person with a disability?

- ☐ Yes
- ☐ No

C. What language do you primarily speak at home?

- ☐ English
- ☐ Spanish
- ☐ Somali
- ☐ Oromo
- ☐ Amharic
- ☐ American Sign Language
- ☐ Hmong
- ☐ Vietnamese
- ☐ Karen
- ☐ Russian
- ☐ Not listed above, write in: _____

D. What is your gender?

- ☐ Female
- ☐ Male
- ☐ Nonbinary
- ☐ Not listed above, write in: _____

STAY IN TOUCH

Get tips and news from us year-round via email and text! We'll contact you about once a month (and not more than four times) and won't share your information. Message and data rates may apply with texting.

- Email _____
- Would you like to receive text messages from us? ☐ Yes ☐ No

PERMISSION TO USE YOUR INFORMATION

Review the Prepare + Prosper (P+P) Permission to Use Your Information handout. If you choose "no" for any of the consents below, P+P cannot e-file your tax return, and you will receive paper copies to sign and mail.

- P+P may keep an electronic copy of my tax return for 3 years. ☐ Yes ☐ No
- P+P may use data containing tax return dollar amounts for marketing, fundraising, or other non-fundraising activity. ☐ Yes ☐ No
- P+P may disclose my tax return information to TaxSlayer (our tax preparation software) to e-file my tax return, and TaxSlayer may disclose my tax return information to P+P for follow-up. ☐ Yes ☐ No

Taxpayer signature _____ Date _____

Spouse signature _____ Date _____

Continue on back

MINNESOTA TAX INFORMATION

1. Were you a resident of Minnesota the entire year? ☐ Yes ☐ No

2. Did you make Minnesota estimated income tax payments in 2021? ☐ Yes ☐ No

If yes, how much did you pay? $_____

3. Did any of the following situations apply to you or your spouse in 2021? Check boxes below.

☐ **None of the following situations apply.**

☐ Paid education expenses for your child in K-12

☐ Made student loan payments

☐ Received an AmeriCorps education award

☐ Completed a masters degree (teachers only)

☐ Made contributions to a 529 College Savings Plan account

☐ Paid for long-term care insurance

☐ Received military service pension/retirement pay

☐ Had a child born in 2021

☐ Experienced a stillbirth

☐ Donated an organ

RENTERS/HOMEOWNERS + K-12 EDUCATION CREDIT ONLY

All other taxpayers stop here.

4. Check boxes below if you or your spouse received any of the following nontaxable sources of income. Do not include income received by your child or any dependents.

☐ **I did not receive any nontaxable sources of income.**

☐ MN Supplemental Aid (MSA)	$_____per month or year
☐ Supplemental Security Income (SSI)	$_____per month or year
☐ MFIP, GA, Emergency Assistance	$_____per month or year
☐ Housing Support (formerly GRH)	$_____per month or year
☐ Workers' compensation	$_____per month or year
☐ Veterans' benefits	$_____per month or year
☐ Rent reduction received for being a caretaker	$_____per month or year
☐ Scholarship, fellowship, grants for college	$_____Box 5 on Form 1098-T
☐ Other nontaxable income, such as: Diversionary Work Payments, HAMP incentives, refugee cash assistance, strike benefits, foster care payments. **Do not include:** Child support, SNAP/food support, or energy assistance.	$_____per month or year Type(s):_____

5. Renters/homeowners/mobile home owners: Did you rent out part of your home or use it for business?

☐ Yes ☐ No

6. Renters: Do you have all of your Certificate(s) of Rent Paid (CRP)?

☐ Yes ☐ No ☐ Not yet

7. Homeowners/mobile home owners: Do you have your 2022 Property Tax Statement?

☐ Yes ☐ No ☐ Not yet

8. Homeowners/mobile home owners: Did you live with someone who is not listed on your tax return?

☐ Yes ☐ No