

Supplemental Questions to Ask Taxpayer for 2024 Minnesota Taxes

Please mark appropriate checkboxes if a question is applicable for the tax year

Tax Payer Name: _____

Minnesota Consents

- ☐ I authorize the Minnesota Department of Revenue to share necessary return information with MNsure for the purpose of contacting me with information about my estimated eligibility for free or reduced-cost health insurance
- ☐ Wish to contribute to the Minnesota Nongame Wildlife Fund
If so, how much? \$ _____ (this will reduce your refund or increase your amount due)
- ☐ Wish to contribute to the Minnesota State Elections Campaign Fund. This will not increase your tax or reduce your refund.
If so, \$5 each to which party? Your Code: _____ *Choose one of the Political Party Codes*
- | | | |
|--|-----------------------------------|----------------------------|
| <input type="checkbox"/> Spouse wishes to contribute. Spouse Code: _____ | 11 - Republican | 16 - Libertarian |
| | 12 - Democratic/Farmer-Labor | 17 - Legal Marijuana Now |
| | 14 - Grassroots/Legalize Cannabis | 99 - General Campaign Fund |

Minnesota Property Tax Refund – Homeowners and Mobile Homeowners

- ☐ Received non-taxable program payments (SSI, MFIP, MSA, GA, EA, DWP, MN Housing Support)? If so, how much? \$ _____
- ☐ Received any other forms of non-taxable income? If so, how much? \$ _____ Describe: _____
- ☐ Owned your personal residence and lived in it as of Jan 2, 2025?
- ☐ Did any non-dependent adult(s) live in your home If yes, complete the Co-Occupant Income Worksheet
- ☐ Do you have the **Property Tax Statement Payable in 2025** (not estimated form)?
- ☐ Did you file a M1PR as a homeowner in 2023 and received a “special refund” on line 38?
- ☐ Lived in a mobile home during any part of the tax year?
- Did you rent or own the **Lot**? ☐ Rent Lot and have CRP ☐ Own Lot and have **2025** Property Tax Statement
- Did you rent or own the **Mobile Home**? ☐ Rent MH and have CRP ☐ Own MH and have **2025** Property Tax Statement

Federal Income Tax Return —Itemized Deductions

- ☐ Received a MN Property Tax refund as a homeowner or mobile homeowner in 2024 (and expect to itemize deductions this year)?
If so, what was the amount of the MN Property Tax refund? \$ _____

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Minnesota Income Tax Return — please be prepared to provide information details. Discuss questions with your Tax Preparer.

- ☐ Paid rent for your personal residence any part of the tax year and have a **2024** CRP
- ☐ Made estimated MN income tax payments or applied last year's refund to this year's tax
- ☐ 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
- ☐ Made payments for long-term care insurance?
If so: Company Name _____ and Policy Number _____
- ☐ You or your spouse made Student Loan payments on loans used for your own higher education
- ☐ Income from another state, other state tax withheld OR moved from another state *Possibly out of scope*
- ☐ Work and live on American Indian Reservation of which you are an enrolled member
- ☐ Military-related Items – if pertinent for you or your spouse as a member or veteran:
 - ☐ 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)
- ☐ Experienced a stillbirth in 2024
- ☐ Had a child born in the tax year and are not participating in an employer pre-tax dependent care assistance program
- ☐ Licensed teacher completed a master's program started after 6/30/2017
- ☐ 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
- ☐ Received a Special (one-time) TY21 Tax Rebate from MN in 2024 (2024 1099MISC)

TAX PREPARER: Refer to Minnesota Scope Manual for elements not on this list that are Out of Scope for MN AARP Tax-Aide