

Jan 28 - Apr 15  
2021

# Free Tax Prep

## What to Bring Checklist

Serving families  
& individuals  
with income up to  
**\$57,000**

### We get results!

IRS-certified volunteers help over 1000 families claim over \$2million in tax refunds every year.

We'll find your maximum correct refund from

- » Earned Income Tax Credit
- » Child Tax Credit
- » American Opportunity education credit
- » Renter or homeowner property tax credit

### Make the most of your refund...

#### Get it fast

Direct deposit and free e-filing speed refunds to you, sometimes in a matter of days.

#### Grow it

Learn about Community Action's programs to build assets and increase income.

Community Action Duluth  
2424 W 5th St, Suite 102  
Duluth, MN 55806

For more information:  
call (218) 726-1665 or visit  
[communityactionduluth.org](http://communityactionduluth.org)

## Paths to Filing

### Virtual

Have access to an email address, internet, and a smartphone or scanner? Our volunteers can prepare your taxes while you stay home.

- Go to [communityactionduluth.org/tax-site-virtual](http://communityactionduluth.org/tax-site-virtual)

### Drop-Off

Don't have access to technology?

- Pick up paperwork at our office M-F 8:30AM-4:00PM or during hours below
- Drop off paperwork and income documents with staff at the following times:

Tuesdays: 4:30PM-7:30PM

Fridays: 4:30PM-7:30PM

Saturdays: 9:00AM-noon

*(Please practice social distancing and DO NOT arrive early)*

- Complete scheduled phone interview
- Sign to give us permission to file your taxes

### Self-file

Interested in filing for yourself for free?

- [myfreetaxes.com](http://myfreetaxes.com)



COMMUNITY  
ACTION Duluth  
Free Tax Site



### Post Season

- » Property tax and renter's rebate returns
- » Current or prior year returns
- » Amended returns

May 3 - May 31; July 12 - August 13 Tuesdays & Thursdays 1:00pm-4:30pm.

Call to schedule appointment.

- 2019 tax return: REQUIRED** if you itemized deductions in 2019 or carry forward a loss **AND** did not do your return at CAD
- Valid photo I.D.
- Acceptable verification of social security numbers for all persons listed on the return (SSN card or document issued by Social Security Administration)
- Birth date for all persons listed on the return
- Income statements or forms for 2020:**
  - Wages from each job (Form W-2)
  - Independent contractor (Form 1099-NEC)
  - Interest (Form 1099-INT)
  - Dividends (Form 1099-DIV)
  - Retirement plan distributions (Form 1099-R)
  - Gambling winnings (Form W-2G)
  - Unemployment (Form 1099-G)
  - Social Security (Form SSA-1099)
  - Railroad Retirement (Form RRB-1099-R)
- Annual income statements for MFIP, SSI, MSA, GA, veterans benefits, or workers compensation
- Receipts for education expenses you paid for your dependents in grades K-12, such as tutoring, music lessons, rental/purchase of instruments, school supplies, computer software or hardware
- Tuition expenses you paid to attend university, college or technical school (Form 1098-T)
- Interest you paid on student loans (Form 1098-E)
- Day care expenses you paid for dependent children, with provider's name, address and tax ID (EIN or SSN)
- Letters acknowledging charitable donations of cash or up to \$500 in non-cash items.
- Purchasers of Marketplace health insurance:** APTC documentation (Form 1095-A is required). All other taxpayers, bring Form(s) 1095-B or 1095-C.
- Health Savings Accounts** Form 5498-SA or 1099-SA
- Homeowners:** Mortgage interest & real estate taxes paid in **2020** (Form 1098) & Statement of Property Tax payable in **2021**, mailed in March 2021.
- Renters:** Certificate of Rent Paid (CRP) in **2020** from each landlord, mailed by January 31, 2021
- Mobile home owners:** Statement of Property Tax payable in **2021** mailed by the county **AND** Certificate of Rent Paid in **2020** from mobile home park.

Be involved. Be inspired.



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