



# Spring & Summer Tax Preparation Free Tax Help 2 Ways

## ● In-Person Tax Help by Appointment Only, Call 313-556-1920

### Eligibility:



Families—household income up to \$54,000



Individuals—income up to \$35,000

### Services:

Missed Deadlines  
Prior Year Returns  
Earned Income Tax Credit (EITC)  
Home Heating Credit  
Homestead Property Tax Credit  
E-Filing  
Direct Deposit  
Access to financial coaching and education

### Locations:

Times and dates vary.  
Call for your appointment today!  
You will get location details at that time.

- **Oakland Financial Hub**  
Ferndale
- **Northend Financial Hub**  
New Center Detroit
- **Northwest Financial Hub**  
Northwest Detroit
- **Southwest Financial Hub**  
SW Detroit (*Hablamos Español*)
- **Osborn Financial Hub**  
Northeast Detroit

## ● DIY Online Tax Help with Free Software, Online Support

### Eligibility:



Anyone with income up to \$64,000

### Services:

Choose from 2 free online software programs:

- H & R Block Online via MyFreeTaxes
- TurboTax Freedom Edition

Help available from the AAS Support Hotline.

### Log On Today:

Tax filers must access Accounting Aid Society's website to use the DIY option.

Go to [www.accountingaidsociety.org](http://www.accountingaidsociety.org) to get started.



**Free tax help is always available at Accounting Aid Society**  
**313-556-1920      [www.accountingaidsociety.org](http://www.accountingaidsociety.org)**

# TAX PREP CHECK LIST

Important documents to take with you to get your 2016 tax returns and tax credit forms prepared and filed

## IDENTIFICATION/SOCIAL SECURITY NUMBERS

- ID: Driver's License or State ID for yourself and spouse
- Social Security card for yourself, spouse and each dependent
- Taxpayers filing a joint return must both be present when the tax returns are prepared. Both spouses must sign a joint tax return.

## INCOME STATEMENTS OR FORMS *(all that apply)*

- A copy of last year's return, if available
- Wages *(all Forms W-2)*
- Unemployment *(Form 1099-G)*
- Pension *(Form 1099-R)*
- Social Security *(Form SSA-1099)*
- Supplemental Security Income (SSI), Letter from SSA
- Interest/Dividends *(Form 1099-INT or 1099-DIV)*
- DHHS Assistance *(DHHS Client Annual Statement)*
- Child Support *(Child Support Annual Statement)*
- Gambling/Lottery Winnings *(Form W-2G)*
- Miscellaneous Income *(Form 1099-MISC)*
- Any other income documentation you may have

## PROOF OF EXPENSES

- Mortgage Interest *(Form 1098)*
- Medical or HMO Premiums paid for self and any family members
- Affordable Care Act Statements *(all that apply)*
  - Form 1095-A Health Insurance Marketplace
  - Form 1095-B Health Coverage
  - Form 1095-C Employer-Provided Insurance
- Dependent care expenses
- Student loan interest or tuition and course materials
  - Form 1098-E or 1098-T



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[www.accountingaidsociety.org](http://www.accountingaidsociety.org)

## AMOUNT OF ANNUAL HEATING COSTS—for the Michigan Home Heating Credit

- The amount you were billed for heating your home from 11/01/2015 to 10/31/2016. This information is usually found on your December or January heat bill. If you cannot find it, contact your heat provider. *The Home Heating Credit is available for renters as well as homeowners.*

## HOMEOWNERS—for the Michigan Homestead Property Tax Credit

- The 2016 taxable value of your home
- A complete copy of your summer and winter property tax bills for 2016

## RENTERS—for the Michigan Homestead Property Tax Credit

- Your lease or rental contract
- Rent receipts for 2016
- Your landlord's name and address

## DIRECT DEPOSIT: FASTEST AND SAFEST WAY TO RECEIVE YOUR REFUND

- Your bank or credit union name
- Routing number
- Account number *(must show proof)*

## [ Smart Decision! ]

Congratulations on your decision to get free tax help... Now check out our other resources!

- No debit card? No problem!**  
Get a debit card at a tax site and have your refund sent directly to your new card
- Put a plan in place for your tax refund**  
Work with a personal financial coach to help you set and meet your goals
- Solve an issue with the IRS**  
Our Low Income Taxpayer Clinic may be able to help
- Thinking of starting your own small business?**  
Get help with business taxes and record keeping techniques
- Get skills, get job-ready**  
Need to update your skills? Our workforce readiness program may help