

# TAX PREP CHECK LIST

## 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
- 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)*
- DHS Assistance *(DHS 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 *(all that apply)*

- 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
  - and account transcript from school

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

- The amount you were billed for heating your home from 11/01/2017 to 10/31/2018. This information should be on your Dec. or Jan. utility 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 2018 taxable value of your home
- A complete copy of your summer and winter property tax bills for 2018

## RENTERS—for the Michigan Homestead Property Tax Credit

- Your lease or rental contract
- Rent receipts for 2018
- 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)*

## FINANCIAL TIPS!

- ✓ **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?**  
Let us help with record keeping techniques from our small business financial services program.