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)
□ MDHHS Assistance (MDHHS Annual Client 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

AMOUNT OF ANNUAL HEATING COSTS—for the Michigan Home Heating Credit
□ The amount you were billed for heating your home from 11/01/2018 to 10/31/2019. 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 2019 taxable value of your home
□ A complete copy of your summer and winter property tax bills for 2019

RENTERS—for the Michigan Homestead Property Tax Credit
□ Tenant Worksheet (Proof of tenant portion of rent)
□ Your lease or rental contract
□ Rent receipts for 2019
□ 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)

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
   - Form 1095-A Health Insurance Marketplace
□ Dependent care expenses
□ Student loan interest or tuition and course materials
   - Form 1098-E or 1098-T and account transcript from school

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.

√ Solve an issue with the IRS
   Our Low Income Taxpayer Clinic may be able to help.