

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 your 2020 tax return
- A copy of your 2019 tax return**
- IRS Letter 6419 - Advance Child Tax Credit Payments**
- 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)*
- Stimulus Payment Letter (if you still have the letter stating the amount you received)
- 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
 - *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*

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

- The amount you were billed for heating your home from 11/01/2020 to 10/31/2021. 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 2021 taxable value of your home
- A complete copy of your summer and winter property tax bills for 2021

RENTERS—for the Michigan Homestead Property Tax Credit

- Tenant Worksheet (Proof of tenant portion of rent)
- Your lease or rental contract
- Rent receipts for 2021
- 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)*

REFERRAL NUMBERS

- To replace social security cards: 1-800-772-1213
- To request an IRS transcript: 1-800-908-9946
- For your heating amount from DTE: 1-877-477-4747