**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

### 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)*

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### 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

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