

CHECKLIST FOR TAXES

- ___ 1. ALL W-2 FORMS – PLEASE BRING IN LAST PAYCHECK STUB
- ___ 2. ALL YEAR END LENDER LOAN STATEMENTS
- ___ 3. 1099 FORMS FOR INTEREST & DIVIDENDS EARNED (INCLUDING NON-TAXABLE & FOREIGN ACCOUNTS)
- ___ 4. CURRENT YEAR’S REAL ESTATE TAXES, TAXABLE VALUE
WE WOULD LIKE TO SEE THE ACTUAL COPIES OF THE REAL ESTATE TAX BILLS.
- ___ 5. LANDLORD’S NAME AND ADDRESS IF YOU RENT, AND TOTAL RENT PAID.
- ___ 6. 1099-B FORMS REPORTING ALL STOCK SALES FOR THE YEAR AS WELL AS PURCHASE DATE AND COST INFORMATION
- ___ 7. 1099-S FORMS REPORTING SALE OF PROPERTY FOR THE YEAR AS WELL AS PURCHASE DATE AND COST INFORMATION
- ___ 8. 1099 FORMS REPORTING UNEMPLOYMENT COMPENSATION, STATE TAX REFUNDS, SOCIAL SECURITY BENEFITS AND DEBT CANCELLATION.
- ___ 9. 1099-R FORMS FOR ALL RETIREMENT FUND DISTRIBUTIONS (Was not required in 2020) (Remember-Required Minimum Distribution at age 70 ½ before 2020 or 72 after 2020)
- ___ 10. SOCIAL SECURITY CARDS FOR ALL INDIVIDUALS THAT ARE NEW THIS YEAR
PROOF OF DEPENDENTS PRINCIPLE RESIDENCE
- ___ 11. COMPLETED ITEMIZED DEDUCTION CHECKLIST
- ___ 12. 1099-MISC AND SCHEDULE SUMMARIZING BUSINESS OR RENTAL INCOME AND EXPENSES IF APPLICABLE
- ___ 13. DATE AND AMOUNT OF EACH ESTIMATED TAX PAYMENT
- ___ 14. CHILD CARE PROVIDERS - NAME, ADDRESS AND SOCIAL SECURITY OR I.D. NUMBER
- ___ 15. ALL INSTALLMENT SALE INFORMATION, PRINCIPAL AND INTEREST (WE WILL NEED NAME AND ADDRESS OF PAYERS & SS#)
- ___ 16. ALL K-1 FORMS FOR PARTNERSHIPS, ESTATE & TRUSTS, LIMITED LIABILITY COMPANIES AND SUB S CORPORATIONS
- ___ 17. ALIMONY PAID PER AGREEMENTS EXECUTED BEFORE 2019 AND SPOUSE’S NAME AND SOCIAL SECURITY NUMBER
- ___ 18. BONUSES, PRIZES & GAMBLING WINNINGS, INCLUDING LOTTERY WINNINGS, W-2G FORMS & CASH. **A PLAY DETAIL REPORT FROM EACH CASINO IF POSSIBLE.**
- ___ 19. I.R.A. CONTRIBUTIONS (INCLUDING ROTH IRA AND NONDEDUCTIBLE IRA CONTRIBUTIONS)
- ___ 20. ANY INHERITANCE, GIFTS RECEIVED, VA BENEFITS AND GAIN ON SALE OF RESIDENCE ARE NOT TAXABLE – BUT ARE PART OF HOUSEHOLD RESOURCES FOR MICHIGAN CREDITS
- ___ 21. ANY OTHER DOCUMENTS YOU FEEL MAY BE NEEDED (INCLUDING NON-TAXABLE INCOME AND ENERGY CREDIT DOCUMENTS)
- ___ 22. WAGES PAID TO HOUSEHOLD EMPLOYEE
- ___ 23. DOLLAR AMOUNT OF **OUT OF STATE INTERNET & MAIL ORDER** PURCHASES THAT WERE NOT TAXED FOR MICHIGAN
- ___ 24. **WE MUST HAVE FORM 1098-T FOR ANYONE CLAIMING EDUCATIONAL CREDIT. ALSO BRING COLLEGE TUITION STATEMENT AND RECEIPTS FOR BOOKS & SUPPLIES.**