Tax Preparation Checklist

Use this checklist to gather your tax records and bring them with you for your tax appointment.

Personal Information

- Birth date and social security number for all family members (provide copies of social security cards if new to this office or they have been updated since last year).
- Copies of drivers license for you and your spouse.
- Your occupation and your spouse's occupation
- Home address, phone number and e-mail address
- Copy of your most recently filed tax return, if not prepared in our office
- Record of federal and state estimated tax payments made for the current tax year
- Amount paid with extension
- Bank name, account and routing numbers and account type for the account(s) where your refund(s) will be deposited or payments withdrawn

Income Information

- W-2 Form(s) for Wages, Salaries, and Tips
- Interest and Dividend Statements 1099-Int/1099-Div
- Social Security Statement
- IRA, Pension/Retirement distribution statements 1099-R
- Sales of Stock, Land, etc.: Form 1099-B or 1099-S
- Brokerage Year-End Tax Statements (Consolidated 1099)
- Cost Basis for all stock/mutual fund sales
- Sales proceeds and cost information for real estate sales
- Miscellaneous Income: Form 1099-MISC
- State Refund Form 1099-G
- Rental income and expenses
- Self employment income, expenses and equipment purchases
- Alimony received, including date of alimony agreement
- Unemployment Compensation Form 1099-G.
- Partnership, Estate or S-Corporation Schedules K-1
- Jury duty pay. Data should come from the court clerk
- Gambling and lottery winnings (W2-G)
- Tax-exempt interest
- Records of digital asset (cryptocurrency) transactions.
- Any other income received during the year

Income Adjustments

- IRA or other retirement fund contributions
- HSA contributions
- Qualified Overtime and Tip income (2025-2028 only)
- Information about the purchase of and interest paid on vehicles during the year (1099-VLI)
- Moving Expenses (if your move was more than 50 miles and dictated by your military employer)
- Teacher out-of-pocket expenses (K-12 educators)
- Student loan interest (Form 1098-E)
- Self-employed health insurance premiums
- Savings withdrawal penalty
- Alimony paid, Social Security number of recipient and date of the alimony agreement

Credits

- Child Care Credit: Provider's address and tax I.D. and amount paid to provider for each child.
- Tuition Credit: Form 1098-T required (include total for required books as a separate amount)
- Savers Credit: Amount contributed to a retirement savings plan such as a 401K or an IRA. Provide documentation of contribution if it doesn't appear on your W2.
- Adoption expenses, including date the adoption is or will be final
- Michigan Rent Credit: Landowner's name and address and the amount paid each month for rent.

Itemized Deductions

- Mortgage and home equity interest statements
- Real estate taxes paid and real estate taxes billed (provide copies of property tax statements)
- License taxes paid on your vehicles and boats to the Secretary of State
- Prescription Drugs
- Doctor and Hospital Bills
- Other medical bills like physical exams, eyeglasses, medical insurance and medical related mileage
- Charitable Donations – Cash (a receipt is required)
- Charitable Donations - household goods (a receipt is required)
- Charitable Donations - out-of-pocket expenses, (a receipt is required)
- Charitable mileage driven (mileage log)
- Investment interest (Margin Interest)

Healthcare Coverage

- If anyone on your return had coverage through the healthcare exchange you will receive form(s) 1095-A that you will need to provide