



Tax & Accounting
Services



January 2017

Checklist of what to bring to your tax appointment

- All W-2 forms
 - Social Security numbers and birthdays for taxpayer, spouse & children
 - Amount of interest, dividends and capital gains received (income or losses)
 - Amount of state & local refunds received last year
 - All income and expenses related to your business
 - All equipment purchases related to your business (date & cost of purchase)
 - Mileage for business and total mileage on vehicle
 - All 1099 forms received showing income from retirement, disability, gambling winnings
 - Amount of Unemployment Compensation received
 - Amount of Social Security Benefits received
 - Amount of rental property income and expenses
 - Amount of IRA contributions
 - Amount of Student Loan interest paid
 - Amount of teacher provided supplies for classroom
 - Amount paid for child care including provider's SS# or Fed. ID# and address.
 - Amount of higher education expenses (tuition, fee & required materials) paid in 2016
 - Tuition Statement Form 1098-T showing tuition paid
 - Amount of health insurance premiums paid (after taxes)
 - Health Insurance Forms 1095-A, 1095-B or 1095-C received
 - Real estate property tax bills showing amount assessed/paid for your property in 2016
 - Amount of Michigan Sales Tax paid in 2016 if you purchased a car, boat or motorcycle
 - 2016 Taxable value of your home (for MI Homestead Credit)
 - Amount paid for auto license fees (autos, trailers, boats, etc)
 - Year-end statement of mortgage interest (Form 1098) and escrow activity on mortgage
 - Charitable contributions (cash, non-cash gifts, mileage)
 - Sale of Home in 2016 - closing papers when bought & sold
 - Amount of job related expenses & union dues
 - Amount of energy efficient home improvements: windows, doors, insulation
 - Amount of 2016 Estimated Tax Payments (Federal, State & City)
 - Amount of purchases bought on Internet/ catalog (for MI Sales & Use Tax)
 - Amount of rent paid in 2016, name and address of landowner
 - 2015 income tax return (unless prepared by Woods Tax & Accounting Service)
 - Direct Deposit information: bank account number & routing number

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