



January 2018

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 2017
- 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 2017
- Amount of Michigan Sales Tax paid in 2017 if you purchased a car, boat or motorcycle
- 2017 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 2017 - closing papers when bought & sold
- Amount of job related expenses & union dues
- Amount of energy efficient home improvements: windows, doors, insulation
- Amount of 2017 Estimated Tax Payments (Federal, State & City)
- Amount of purchases bought on Internet/ catalog (for MI Sales & Use Tax)
- Amount of rent paid in 2017, name and address of landowner
- 2016 income tax return (unless prepared by Woods Tax & Accounting Service)
- Direct Deposit information: bank account number & routing number