



Tax & Accounting  
Services



January 2019

## 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 2018
- ☐ 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 2018
- ☐ Amount of Michigan Sales Tax paid in 2018 if you purchased a car, boat or motorcycle
- ☐ 2018 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 2018 - closing papers when bought & sold
- ☐ Amount of job related expenses & union dues
- ☐ Amount of energy efficient home improvements: windows, doors, insulation
- ☐ Amount of 2018 Estimated Tax Payments (Federal, State & City)
- ☐ Amount of purchases bought on Internet/ catalog (for MI Sales & Use Tax)
- ☐ Amount of rent paid in 2018, name and address of landowner
- ☐ 2017 income tax return (unless prepared by Woods Tax & Accounting Service)
- ☐ Direct Deposit information: bank account number & routing number



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