



Tax & Accounting  
Services



## Checklist of what to bring to your tax appointment

January 2024/5

### Personal Information:

- ☐ Social Security numbers and birthdays for taxpayer, spouse & children
- ☐ 2023 income tax return (unless prepared by Woods Tax & Accounting Service)
- ☐ Direct Deposit information: bank account number & routing number

### Income

- ☐ All W-2 forms
- ☐ 1099-Int, -Div, -B or K-1s for investment or interest income
- ☐ 1099-G forms for unemployment income or state & local refunds received last year
- ☐ Business income and expenses: profit/loss statement
- ☐ All equipment purchases related to your business (date & cost of purchase)
- ☐ Mileage log for business and total mileage on vehicle
- ☐ 1099-R, Form 8606 for Payments/distributions from IRAs or retirement plans
- ☐ 1099-C forms for cancellation of debt
- ☐ SSA-1099 for Social Security Benefits received
- ☐ Rental property income and expenses: profit/loss statement
- ☐ 1099-S forms for income from sale of a property: closing papers when bought & sold
- ☐ Miscellaneous income: jury duty, gambling winnings, scholarships, etc.
- ☐ 1099-K Income from third-party payment network transactions like PayPal or Venmo

### Adjustments to Income

- ☐ Amount of IRA contributions
- ☐ Form 1098-E Student Loan interest paid
- ☐ Form 1098-T for tuition paid for college and cost of required materials)
- ☐ Teachers: Amount of supplies provided for classroom
- ☐ HSA or MSA contributions (Health Savings Account or Medical Savings Account)
- ☐ Self-employed health insurance payment records
- ☐ Keogh, SEP, SIMPLE and other self-employed pension plans

### Deductions and Credits

- ☐ Child care costs: provider's SS# or Fed. ID# and address and amount paid
- ☐ Form 1098: Mortgage interest, private mortgage insurance (PMI), points paid
- ☐ Health Insurance Forms 1095-A, 1095-B or 1095-C received
- ☐ 2024 Taxable value of your home (for MI Homestead Credit)
- ☐ Charitable contributions (cash, non-cash gifts, mileage)
- ☐ Energy Efficient Improvements to your primary residence

### Taxes Paid

- ☐ Real estate property tax bills showing amount assessed/paid for your property in 2024
- ☐ Amount of Michigan Sales Tax paid in 2024 if you purchased a car, boat or motorcycle
- ☐ Amount paid for auto license fees (autos, trailers, boats, etc)
- ☐ Amount of 2024 Estimated Tax Payments (Federal, State & City)
- ☐ Amount of purchases bought on Internet/ catalog (for MI Sales & Use Tax)

### Other

- ☐ Amount of rent paid in 2024, name and address of landowner
- ☐ Foreign bank account information: location, name of bank, account number, account value during the year



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