



**Tax & Accounting
Services**



Checklist of what to bring to your tax appointment

January 2026

Personal Information:

- ☐ Social Security numbers and dates of birth for taxpayer, spouse & dependents
- ☐ 2024 income tax return (unless prepared by Woods Tax & Accounting Service)
- ☐ Direct deposit information: bank routing number and account number

Income

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

Adjustments to Income

- ☐ IRA contribution amounts
- ☐ Form 1098-E student loan interest paid
- ☐ Form 1098-T for tuition paid for college and cost of required materials
- ☐ Teachers: total amount spent on classroom supplies
- ☐ HSA or MSA contributions (Health Savings Account or Medical Savings Account)
- ☐ Keogh, SEP, SIMPLE and other self-employed pension plan contributions

Deductions and Credits

- ☐ Child care expenses: provider's name, address, SSN or Federal ID and amount paid
- ☐ Form 1098: Mortgage interest, private mortgage insurance (PMI), points paid
- ☐ Health Insurance Forms 1095-A, 1095-B or 1095-C received
- ☐ 2025 Taxable value of your home (for MI Homestead Property Tax Credit)
- ☐ Charitable contributions (cash, non-cash gifts, mileage)
- ☐ Energy-efficient improvements to your primary residence
- ☐ Interest paid on new car Loan, vehicle VIN

Taxes Paid

- ☐ Real estate property tax bills showing amount assessed/paid in 2025
- ☐ Michigan Sales Tax paid in 2025 for vehicle, boat or motorcycle purchases
- ☐ Auto license and registration fees (autos, trailers, boats, etc)
- ☐ 2025 estimated tax payments (Federal, State & City)
- ☐ Internet/ catalog purchases subject to MI Sales & Use Tax

Other

- ☐ Total rent paid in 2025 and landlord's name and address
- ☐ Foreign bank account info: location, bank, account number, account value during year
- ☐ Trump Account election for children under the age of 18