

AccountingAidSociety

Tax Preparation Checklist

IDENTIFICATION/SOCIAL SECURITY CARDS

- Photo ID: Driver's License or State ID for yourself and spouse
- Social Security card for yourself, spouse and each dependent
- Taxpayers filing a joint return must both be present when the tax returns are prepared. Both spouses must sign a joint tax return.

INCOME STATEMENTS OR FORMS (all that apply)

- A copy of your 2024 tax return
- Wages
 - Forms W-2 from all jobs – required
 - Last pay stub of 2025 – bring in addition to your W-2
- Unemployment (Form 1099-G)
- Pension (Form 1099-R)
- Social Security (Form SSA-1099)
- Supplemental Security Income (SSI), Letter from SSA
- Interest/Dividends ([Form 1099-INT](#) or [1099-DIV](#))
- MDHHS Assistance (MDHHS Client Annual Statement)
- Child Support (Child Support Annual Statement)
- Gambling/Lottery Winnings ([Form W-2G](#))
- Self-Employment Documents (Form 1099-NEC, Form 1099-K)
- Miscellaneous Income ([Form 1099-MISC](#))
- Any other income documentation you may have

PROOF OF EXPENSES (all that apply)

- Mortgage Interest ([Form 1098](#))
- Medical or HMO Premiums paid for self and any family members
- Dependent care expenses
- Student loan interest ([Form 1098-E](#))
- Tuition and course materials ([Form 1098-T](#) and account transcript from school)
- Expenses related to Self-Employment (including a log of business miles)

DIRECT DEPOSIT: Required for Federal Refunds

- Your bank or credit union name
- Routing number
- Account number (must show proof)

MICHIGAN HOME HEATING CREDIT

- **Annual Heating Costs** – The amount you were billed for heating your home from 11/01/2024 to 10/31/2025. This information should be on your Dec. or Jan. utility bill. If you cannot find it, contact your heat provider. The Home Heating Credit is available for renters as well as homeowners.

MICHIGAN HOMESTEAD PROPERTY TAX CREDIT

- **Homeowners**
 - The 2024 taxable value of your home
 - A complete copy of your summer and winter property tax bills for 2025
- **Renters** (all that apply)
 - Your lease or rental contract
 - Rent receipts for 2025
 - Your landlord's name and address
 - Subsidized Housing – Tenant Worksheet (Proof of tenant portion of rent)
 - Co-op Residents: Letter Stating Share of Taxes

HEALTH INSURANCE DOCUMENTATION (all that apply)

- Health Savings Account Documentation ([Form 1099-SA](#) and [Form 5498-SA](#))
- Marketplace Insurance ([Form 1095-A](#))

REFERRAL NUMBERS

- To replace social security cards: 1-800-772-1213
- To request an IRS transcript: 1-800-908-9946
- For your heating amount
 - DTE: 1-800-477-4747
 - Consumers: 1-800-477-5050

Make an Appointment!

Call 313-556-1920 or [schedule online!](#) See our [Current Tax Site Locations and Hours](#)