

# What to bring to 2023 tax appointment

## Employment and Income Documents

1. **W-2 Forms:** If you're employed.
2. **W-2G Forms:** For lottery, casino, or sportsbook gambling winnings.
3. **1099-NEC:** If you're self-employed or a subcontractor.
4. **1099-MISC:** For other income not from self-employment.
5. **1099-INT:** For interest earned from banks.
6. **1099-DIV:** For dividends from stocks or mutual funds.
7. **1099-R:** For pensions or 401(k) withdrawals.
8. **1099-B:** For sold stocks (include original purchase date and amount).
9. **1099-G:** For unemployment or state refunds.
10. **1098-T:** For paid tuition (cash, credit, student loan).
11. **SSA-1099:** For Social Security income.
12. **K-1 Form:** For partnerships, S-Corporations, or trusts/estates.
13. **1099-A:** If you lost a house to foreclosure.
14. **1099-C:** For any canceled debts.
15. **1099-K:** For sales from credit cards/eBay (side business income).
16. **1099-S:** For a short sale or if you sold your home.
17. **1095-A:** Health Insurance Marketplace Statement.

## If You Itemized Last Year

- Property tax bills (Summer 2023, Winter 2023).
- Mortgage interest statements.
- Closing papers (if you bought/sold/refinanced a home).
- License plate renewal costs.
- Charitable contributions (cash and non-cash).
- Receipts for major purchases (car and boat and windows doors hvac roof etc)

## Other things

- Income and expenses from rental property.
- IRA contributions (Roth or Traditional).
- Michigan MESP or MET contributions.
- Alimony details (paid/received, date of divorce, ex-spouse's SSN).
- Annual rent details (amount, landlord name, and address).
- Social Security numbers and birthdays for all dependents.
- Daycare expenses (amount, provider details, tax ID).
- Student loan interest statements.
- Business expenses and sales figures (if you're a business owner).
- Classroom expense receipts (if you're a teacher).
- Home heating credit (Consumers Energy bill for the year for low-income households).

## Identification

- Taxpayer driver's licenses or state IDs.

**This comprehensive checklist will help ensure you have all the necessary documents for your tax appointment, facilitating a smoother and more efficient filing process.**