

What to bring to 2024 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 2024, Winter 2024).
- 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.