



CHECK LIST:

WHAT TO BRING TO AN *ACCOUNTING AID SOCIETY* TAX SITE TO GET YOUR TAXES & CREDITS PREPARED

IDENTIFICATION/SOCIAL SECURITY NUMBERS

- ID: Driver's License or State ID
- Proof of Social Security numbers for yourself, spouse and each dependent

INCOME STATEMENTS OR FORMS

- A copy of last year's return, if available
- Wages (*all Forms 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*)
- DHS Assistance (*DHS Annual Statement*)
- Child Support (*Child Support Annual Statement*)
- Gambling/Lottery Winnings (*Form W-2G*)
- Miscellaneous Income (*Form 1099-MISC*)
- Any other income documentation you may have

PROOF OF EXPENSES

- Purchase of new home or automobile
- Energy Efficient Home Appliances and Improvements (*receipts should show Energy Star Rating*): insulation; windows; furnace; air conditioning system; water heater; refrigerator; clothes washer; dishwasher
- Residential electric bills
- Medical or HMO Premiums paid for self and/or family members
- Dependent care expenses
- Student loan interest or tuition and course materials

AMOUNT OF ANNUAL HEATING COSTS

Call your heat provider and ask for your heating costs for the year. For 2009 taxes, the period will be 11/01/2008–10/31/2009. (This information can be found in your Dec., Jan., and Feb, statements.) *The Home Heating Credit is available for renters as well as homeowners.*

HOMEOWNERS

Taxable value of your home and the summer and winter property taxes bills for the tax year. *For the Michigan Homestead Property Tax Credit, bring a complete copy of your summer and winter property tax bills.*

RENTERS

Your lease or rental contract and rent receipts for the tax year, plus your landlord's name and address, *for the Michigan Homestead Property Tax Credit.*

FOR DIRECT DEPOSIT

Your bank or credit union name, routing number and account number. Direct deposit is the fastest and safest way to receive your refund.



Tax site nearest me:

Date and time I plan to go:

If an appointment is needed, my appointment is scheduled for:
