



Hawkins Accounting, Inc.

What to Bring to Your Tax Appointment

*this is general guideline; not all items on the list will apply to your situation

New clients:

We need a copy of last year's income tax return, Social Security (and ITIN) numbers and cards, birthdates for everyone on the return (spouse, children, and other dependents) are needed

Returning clients:

Social Security (and ITIN) numbers and cards, birthdates for **NEW** spouse, children, and other dependents.

If you have moved during the year, provide your new address and date you moved

All Clients:

Direct deposit information

Income Documents

Any/all W2s from every place you worked last year

Any/all W2g(s) received from any gambling proceeds

All 1099's

- o Interest
- o Dividends
- o Brokerage Statements
- o Unemployment
- o Social Security Statements
- o Cancellation of Debt (credit cards, home foreclosure, Loan Modification or other debt forgiveness)
- o Long Term Care Benefits
- o Pension, Annuities, IRAs, 401-K, other Retirement benefits

Any/all K-1 from business investments

If you are Self Employed

- o Any/all 1099-Misc received
- o Any/all 1099-Ks received (credit card payments)
- o List of other income and expenses

Day care Providers, Self Employed individuals or clients with Rental Properties; fillable forms to complete and print to bring to your appointment are located on the Recourses tab



Hawkins Accounting, Inc.

General

- If you pay estimates (federal, state or city) provide the amounts and dates paid and to whom
- 1098-T for Tuition paid and the payment statements from the college for tuition, books and other expenses
- Statement from daycare providers, with the name address, and ID number for the provider
- Health Savings Account statements
- Student loan interest
- If you had health insurance through the Market Place bring the 1095-A
- If you have bought or sold a home or property during the year, bring all closing statements
- If you lost a home due to foreclosure or surrender, bring in the 1099-A, 1099-C or any other documents regarding the cancellation of the debt
- If you are receiving land contract payments provide the amount received as interest and as principle monthly. Also provide the name of the person you are receiving it from.
- If you are paying monthly payments on a land contract provide the amount you pay as interest and as principle. Also provide the name of the person you are paying to
- Moving Expenses
- Amount of alimony paid or received
- A summary of educator expenses

If you itemize

To be able to itemize you must have deductions over the standard deduction

MFJ: \$25.100 Single: \$12.550 Head of Household: \$18.800

- Any/all 1098s from banks, credit unions (mortgage interest)
- A summary of medical expenses
- Property tax statements for all property you own
- An itemized list of Charitable contributions (you must have receipts for all charitable gifts, both cash and non-cash)
- The amount you pay for your license plates for your vehicle



Hawkins Accounting, Inc.

Michigan Tax Credit Information

****Clients with income up to 60,000****

- Medical insurance premiums paid (after tax dollars)
- Child support received in the past year
- Veteran's disability pension
- ADC or other public cash assistance
- Workman's compensation

Homeowners

Bring your summer and winter tax bills for the past year (paid or unpaid)

The amount paid to heat your home (found on your January Consumer's bill)

Renters

Provide the name and address of your landlord plus the amount you pay each month

The amount paid to heat your home (found on your January Consumer's bill)