

2024 Things to Bring

Personal & Dependent Information

- Copy of **State-issued driver's license**, or number, issue date and expiration date
- Names, dates of birth & social security numbers for **new** dependents
- Bank account number, routing number and type of account (savings or checking)
- Record of estimated tax payments made (Form 1040-ES), if any
- Prior year return (if not prepared by us)

Sources of Income

- Wages from **all** employers (W-2)
- Pension, IRA & Annuity (1099-R)
- Social Security & RRB (1099-SSA, RRB-1099)
- Brokerage statements (1099-Consolidated)
- Interest & Dividend (1099-INT, OID, DIV)
- Sales of stock or property (1099-B, 1099-S)
- Unemployment Compensation (1099-G)
- Business & Miscellaneous (1099 Forms)
- S-Corporation & Partnership statements (K-1s)
- Rental & Farm (Income & Expenses)
- Gambling income (W-2G)
- Jury duty
- Hobby income
- Prizes & awards
- Trusts
- Royalties
- Alimony paid or received with ex-spouse's name and Social Security Number

Michigan Tax Return

- Driver's License info is **required** (see above)
- Property taxes **levied** (Winter & Summer 2024 regardless of when paid) or rent paid if Total Household Resources are less than \$67,300
- Contributions to Michigan Education Trust Program (MET, MESP, 529 Plan)
- Child Support and Veteran's Benefits if Total Household Resources are less than \$67,300

Types of Deductions

The following deductions, in total, **must exceed the standard deduction** (\$14,600 for single filers and \$29,200 for married filing joint) to be relevant:

- Medical Expenses (**only relevant if total amount exceeds 7.5% of income**)
 - Healthcare & LTC insurance
 - Doctors, dentists & hospitals
 - Number of miles driven for medical
- Property tax records (all **paid** in 2024)
- License plate fees
- Sales tax on vehicles, boats, or RV's
- Mortgage Interest (Form 1098)
- Mortgage Insurance Premiums
- Equity loan interest if proceeds used to buy, build, or substantially improve your home
- Monetary amounts of charitable donations
- Records of non-cash charitable donations
- Number of miles driven for charity

The following **do not need to exceed** the above-mentioned **standard deductions** to be relevant:

- Child Care expense amounts paid **by child & provider's name**, address and social security or tax ID number
- Tuition (Forms 1098-T) and **year of student** (Freshman, Sophomore, Junior, Senior, etc.)
- Receipts for qualified educational expenses (books, computers, etc.)
- Records of any scholarships or fellowships received, if not on Form 1098-T
- Student Loan Interest (Form 1098-E)
- Classroom expenses (for educators K-12)
- Marketplace Health Care (Form 1095-A)
- Health Savings Account (**employer & personal**) contributions (Form 5498-SA) and type of plan (**individual or family**)
- Health Savings Account reimbursements (Form 1099-SA)
- IRA contributions (Form 5498)
- Home office expenses, only if self-employed
- Details** of energy improvements to home
- Details** of electric vehicle purchases