

United Way of South Central Michigan VITA Shared Services Program



What to Bring to Your Free Tax Preparation Appointment

Social Security card, Form SSA-1099, or ITIN letter for EVERYONE on the return: If you do not have these documents for yourself, spouse, or dependent, you **MUST** contact Social Security Administration to get them before your tax appointment. To contact the Social Security Administration call 1-800-772-1213

Photo ID: for yourself and spouse (if filing jointly)

Proof of all income such as W2's, 1098's, 1099's, records of money received and expenses paid if self-employed, Supplemental Security Income (SSI), Department of Health and Human Services (DHHS) benefit letters, or any other documentation of money received for yourself, your spouse, and all dependents.

Forms 1095-A – Advanced Premium Tax Credit (Marketplace health insurance)

Forms 1099-SA and Form 5498-SA - Health Savings Account

Form 1098-E - Student Loan Interest Statement

Amount of Insurance premiums paid for health care not reported on a W-2 or 1099. Include amounts paid for yourself, spouse and/or dependents.

Childcare credit: Bring the total amount paid by you along with the name, address, and tax identification number of the person or center who cared for your child.

Education credits: Bring all 1098-T statements, a printout of all student account summaries, and receipts for all course-related books and materials purchased.

Michigan Homestead Property Tax Credit:

- **Homeowners**, please bring your summer and winter tax bills. If your taxes are escrowed, or if you cannot find your bills, please contact your village, township, or city treasurer to get copies.
- **Renters**, name must be on the lease. Renters need to know how much they paid in rent, the landlord or complex name and address.

Michigan Home Heating Credit: Your January, February, or March Heat Bill. If you cannot find it contact your heat provider. To contact Consumer Energy call 1-800-477-5050, or DTE 1-800-477-4747. If you use propane, fuel oil, or wood to heat your home, bring the total amount paid November 1, 2021 through October 31, 2022.

Direct Deposit bring your account number and the routing number of your bank or credit union.

A copy of your prior year tax return, if available.

Any "Important Tax Documents" you may have received.

We are unable to help international taxpayers, taxpayers with rental income, or those who have businesses with expenses over \$25,000, employees, inventory, or incurred a loss.

Other less common tax situations may also be out-of-scope. Service is not guaranteed.

**United Way of
South Central Michigan**



Calhoun | Clinton | Eaton | Ingham | Jackson | Kalamazoo