

# VITA CLIENT ENVELOPE

Capital Area United Way's VITA Program will be opening starting January 24th for the Lansing area, January 31st in Washtenaw, County. You can use the checklist below to help you gather your tax documents before the start of tax season!

Client Name \_\_\_\_\_ Tax Year \_\_\_\_\_ Zip Code \_\_\_\_\_

## INCOME

- Salary or wages, **W-2**
- Self-employment income  
**1099-MISC/NEC**
- Retirement income, **1099-R**
- Investment or Interest income,  
**1099-INT** and/or **1099-DIV**
- Unemployment income, **1099-G**
- Social Security Benefits, **SSA-1099**
- Exchange stocks, bonds, virtual  
currency or real estate,  
**1099-S** and/or **1099-B**

## OTHER INCOME

You may have earned income, but may not receive a tax form in the mail. Here are some examples:

- Tip income NOT in a W-2
- Alimony or maintenance income
- Self-employment income NOT reported in a 1099-MISC/NEC form
- Any gifts (nontaxable income)
- \_\_\_\_\_

## EXPENSES

- College tuition and fees, **1098-T**
- Student loan interest, **1098-E**
- Mortgage interest, Form **1098**
- Self-employment expenses
- Medical & Dental expenses
- Childcare such as daycare
- Healthcare Premiums, **1095-A**
- Contributions to a retirement  
account

## RENT OR PROPERTY TAXES

Make sure to have the following information to get the most benefits from your Michigan tax return:

- Homeowners:** Property taxes paid both winter and summer
- Co-op Housing:** tax information letter from the organization
- Renters:** amount of monthly rent paid as well as:
  - landlord's name and address
- Heating type and provider

## What to do now?

**VITA appointments open early January!**  
Call 2-1-1 to schedule your appointment starting January 10th.

You will also need:

- Photo ID** for all adults  
Social Security Numbers (**SSNs**)  
or Individual Tax Identification  
Numbers (**ITINs**) for **everyone**  
(including dependents).
- Bank account information, if you  
wish to use direct deposit or  
payment



**United Way  
of Washtenaw County**