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

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

OTHER INCOME

- 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)

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