

TAX QUESTIONS FOR RETURN

IF YOU HAVE ANY OF THESE, PLEASE BRING IN YOUR TAX FORMS!

- 1) Do you receive health insurance from the Marketplace/Obama Care?
- 2) Do you have an HSA account (Health Savings Account)? Did you use any money from it?
- 3) Did you renew your driver's license in the past year? If so, we need new copies.
- 4) At any time last year did you receive (as a reward, payment or award) sell, exchange, give or otherwise dispose of a digital asset? OR any financial interest in a digital asset?
- 5) Do you gamble online ie: Fanduel / Draft Kings / OR have Gambling winnings?
- 6) Did you do any energy home improvements last year: Home energy audit you paid for, New "exterior" windows/doors any insulation, new furnace, water heater, central air, any solar or geothermal heat pump? If so, Total paid _____ & what for _____?
- 7) Did you sell any stock, if so, do you have the 1099-B statement?
- 8) Are you a Teacher???
- 9) Did you contribute any Charitable Contributions from your IRA directly to a (QCD) Qualified Charitable Distribution?
- 10) Did you contribute any \$\$\$ to a Michigan MESP 529 (MI Education Savings Plan)
- 11) Did you have any Jury duty Pay, Alimony, Child Support Income? Please tell us all "sources" of income (even if not taxable ei: VA Benefits, SS disability income) **YOU ARE TAXED ON WORLDWIDE INCOME**
- 12) Did you have any "self-employment" Income? If so , we need your income & expenses report.
- 13) Any Student Loan Interest, if so we need your 1098-E form?
- 14) Did you take any college classes, if so we need your 1098-T form?
- 15) Do you have any unemployment, if so we need your form 1099-G?
- 16) Did you buy an EV electric vehicle? What date did you buy it and how much was it?
- 17) Did you contribute to a SEP, ROTH or regular Individual Retirement account? If so, how much?
- 18) Do you have any daycare Expenses? If so, we need your daycare report from your provider.
- 19) Were you a government employee hired before 1991 and DID NOT Pay into Social Security & Retired before 2013? (If so, your preparer needs to know for Michigan taxable income)
- 20) **DO YOU NEED** A CITY tax return prepared. If you live or work in a city that has income tax!