

AARP Tax-Aide

Items to bring with you to have your 2023 Income Tax returns prepared:

PHOTO IDS AND SOCIAL SECURITY CARDS FOR YOURSELF AND EACH PERSON ON THE TAX RETURN

- Copy of last year's income tax return(s) (2022);
- Checking or savings account number and routing number for your financial institution if you want direct deposit;
- Identity Protection PIN for the current year if applicable;
- W-2 forms from each employer;
- 1099G for any unemployment compensation received;
- SSA-1099 form if you were paid Social Security benefits or RRB-1099 form if you receive railroad retirement benefits;
- All 1099 forms (1099-INT, 1099-DIV, 1099-B, etc.) showing interest and/or dividends received and brokerage statements showing detail of any assets you've sold;
- 1099-MISC showing any miscellaneous income;
- 1099-R form if you received a pension or annuity;
- All forms indicating federal income tax paid;
- Dependent care provider information (name, employer ID or social security number) if applicable;
- Summary list of expenses if you are itemizing deductions;
- Form 1095-A, Health Insurance Marketplace Statement (if 2022 health insurance was purchased through the marketplace);
- Amounts you were billed for heat from 11/1/2022– 10/31/2023 if you may be eligible for the MI home heating credit;
- Property tax bills for 2023, paid or unpaid if you may be eligible for the MI property tax credit.
- Most recent vehicle insurance bill showing the medical portion of the PIP cost. This is needed if you are eligible for the MI property tax credit.