

Client: \_\_\_\_\_

## INCOME

W-2	Wage/Salaries/Tips	_____
1099-INT	Interest	_____
1099-DIV	Dividends	_____
1099-MISC	Rents, Royalties	_____
1099-NEC	Self-Employment	_____
1099-R	Pension, IRA, Rollover	_____
W-2G	Gambling, Lottery	_____
1099-C	Cancellation of Debt	_____
1099-G	Unemployment	_____
1099-G	State/City Tax Refund	_____
<b>1099-DA</b>	<b>Cryptocurrency Sales</b>	_____
1099-B	Capital Gains/Losses	_____
1099-S	Property Sale	_____
1099-Q	Education Disbursement	_____
1099-SA	HSA Disbursement	_____
K-1 for		
Partnerships		_____
S-Corporation		_____
Trust/Estate		_____
SSA-1099	Social Security	_____
RRB-1099	Railroad Retirement	_____
Alimony	(only if divorce final before 1/1/2020)	_____
Real Estate/Personal Property Rental		_____
Scholarships/Fellowships		_____
Jury Duty		_____
Property Tax Rebate Recovery		_____
Foreign Earned Income		_____
Gig Work (Airbnb, Uber, Taskrabbit, etc)		_____

## DEDUCTIONS/CREDITS/TAXES

1098-E: Student Loan Interest	_____
1098-T: College Tuition/Fees/Books	_____
1095-A: Fed Marketplace Health Insurance	_____
Alimony Paid (only if divorce final before 1/1/2019)	_____
Childcare/Day Camp Expenses (child <13) (We need provider's name, address, and tax ID number)	_____
Household Employers (Nanny Tax)	_____
IRA/SEP/SIMPLE Contributions	_____
Roth IRA Contributions or Conversion	_____
Teacher's Classroom Expenses	_____
HSA Contributions	_____
Adoption Expenses	_____
Self-Employed Health Insurance Premiums	_____
Retirement Saver's Credit	_____
Residential Energy Improvements (solar, wind and geothermal, windows, exterior doors, furnace, A/C, certain water heaters, electrical panel upgrade)	_____
Electric Vehicle Purchase/Lease	_____
Qualified Business Income Deduction	_____
Qualified Charitable Donation (RMD to charity)	_____
<b>Tips Received Deduction</b>	_____
<b>Overtime Income Deduction</b>	_____
<b>New Senior Deduction (\$6,000; Age 65+)</b>	_____
<b>New Vehicle Loan Interest (purchased in 2025)</b>	_____

## ITEMIZED DEDUCTIONS

(only used if sum is greater than the Standard Deduction:  
**\$15,750 Individual; \$23,625 HoH; \$31,500 MFJ**)

### Medical, Dental, & Optical

(Medical total must exceed 7.5% of income to be deductible)

Prescription Drugs	_____
Health Insurance Premiums (not including pre-tax payroll deduction)	_____
Long Term Care Insurance	_____
Number of Medical Miles	_____
Doctor, Dental, Hospital and Lab Fees	_____
Vision, Eyeglasses and Contacts	_____
Nursing Home Care	_____
Special Needs Education	_____

### Taxes Paid

(Aggregate Taxes Paid deduction capped at \$40,000)

Sales Tax (cars, boats, RVs)	_____
Primary Residence Prop Taxes	_____
Other Property Taxes (land, second home)	_____
Auto License Plate Registration	_____

### Interest Paid

Home Mortgage Interest (Form 1098)	_____
Home Equity Loans (Form 1098) (must be used to buy/build/improve property securing debt)	_____
Investment Loans	_____

### Charitable Contributions

Check, Credit Card, Appreciated Asset, and Payroll Deductions  
(Each donation of \$250+ needs written acknowledgement from charity)

Goods  
(If over \$500, you must have a list of donated items, charity address, and date of donation. If over \$5,000, you need appraisal)

Volunteer Expenses / Mileage  
(Value of volunteer time is not tax deductible)

### Miscellaneous

Virtual Currency Transactions	_____
Foreign Financial Account	_____
Foreign Trust	_____
Casualty Loss (Fed Declared Disaster Only)	_____
Gambling Losses (cannot exceed winnings)	_____

Notes: \_\_\_\_\_

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## Tax Estimates Paid for 2025

	Federal	Michigan	City	Date Paid
1st Quarter	_____	_____	_____	_____/_____/_____
2nd Quarter	_____	_____	_____	_____/_____/_____
3rd Quarter	_____	_____	_____	_____/_____/_____
4th Quarter	_____	_____	_____	_____/_____/_____
<b>TOTAL</b>	_____	_____	_____	

## Michigan Taxes

### **Non-taxable Income (required for Michigan credits)**

Child Support	_____
Veterans Pension	_____
Worker's Compensation	_____
Public Assistance (DHS)	_____
Inheritance	_____
Gifts Received in Excess of \$300	_____
Gain on Sale of Primary Residence	_____

### **Homestead Property Tax Credit**

<u>If you own your home</u>	
Property Taxes Billed for 2025	_____
Taxable Value of home for 2025	_____

#### If you rent your home

Rent Paid Per Month	_____
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Landlord's Name and Address	_____
	_____
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### **Contributions to MESP or MET College Savings Plans**

### **Flow-through Entity tax payments allocated to individual**

Additional Questions?

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