Wink Tax Services Tax Appointment Checklist

Whether you choose to file your tax return with us virtually or in our office,
here is a detailed list of items that will be important when we complete your tax return.

Call (248) 816-1220 today to schedule an appointment or stop by or schedule online.

2701 Troy Center Drive, Ste 255
Troy, MI 48084

Try our Virtual Tax Service or Drop-Off Tax Service this year!

Visit www.winktax.com

Please Note: For virtual tax clients, we can accept a scan or image of these items

Personal Information

- ☐ Your driver's license or other federal ID with picture
- ☐ Your social security card with your number or tax ID number
- ☐ Your spouse's full name and social security number or tax ID number
- ☐ Your spouse's driver's license or other federal ID with picture
- ☐ Notice 1444 for Stimulus check

Dependent(s) Information

- ☐ Dates of birth
- ☐ Social security numbers or tax ID numbers (cards must be provided if this is your first year with us or if this is a new child)
- ☐ Childcare records (including the provider's tax ID number) if applicable
- ☐ Income of other adults in your home
- ☐ Form 8332 showing that the child's custodial parent is releasing their right to claim a child to you, the noncustodial parent (if applicable)

Income Sources

- **Employed**
  - ☐ Forms W-2 or paystub for W-2 download
- **Unemployed**
  - ☐ Unemployment income, state tax refund (1099-G)

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- **Self-Employed**

  - ☐ Forms 1099-MISC, 1099-NEC, Schedules K-1, income records to verify amounts not reported on 1099s
  - ☐ Records of all expenses — check registers or credit card statements, and receipts
  - ☐ Business-use asset information (cost, date placed in service, etc.) for depreciation
  - ☐ Office in home information, if applicable
  - ☐ Record of estimated tax payments made (Form 1040ES)
  - ☐ Auto loan or lease if vehicle used for business

- **Rental Income**

  - ☐ Records of income and expenses
  - ☐ Rental asset information (cost, date placed in service, etc.) for depreciation
  - ☐ Record of estimated tax payments made (Form 1040ES)

- **Retirement Income**

  - ☐ Pension or Retirement income/IRA/annuity income (1099-R)
  - ☐ Traditional IRA basis (i.e. amounts you contributed to the IRA that were already taxed)
  - ☐ Social security/RRB income (1099-SSA, RRB-1099)

- **Savings & Investments or Dividends**

  - ☐ Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)
  - ☐ Income from sales of stock or other property (1099-B, 1099-S)
  - ☐ **Any cryptotax currency** transaction information (purchase or redemption)
  - ☐ Dates of acquisition and records of your cost or other basis in property you sold (if basis is not reported on 1099-B)
  - ☐ Health Savings Account (HSA) and long-term care reimbursements (1099-SA or 1099-LTC)
  - ☐ Health Savings Account (HSA) or Medical Savings Account (MSA) distributions – 1099-SA
  - ☐ Expenses related to your investments
  - ☐ Record of estimated tax payments made (Form 1040ES)

- **Other Income & Losses**

  - ☐ Lottery or Gambling income/losses (W-2G or records showing income, as well as expense records)
  - ☐ Jury duty records
  - ☐ Hobby income and expenses
  - ☐ Prizes and awards
  - ☐ Trusts
  - ☐ Royalty Income 1099 Misc.
  - ☐ Any other 1099s received
  - ☐ Record of alimony paid/received with Ex-spouse's name and SSN and Date of Divorce.

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Deductions

- **Real Estate/Home Ownership**

  ☐ Forms 1098 or other mortgage interest statements
  ☐ Real estate and personal property tax records
  ☐ Receipts for energy-saving home improvements
  ☐ Repayment of the First-Time Homebuyer Credit – Form 5405
  ☐ All other 1098 series forms

- **Charitable Donations**

  ☐ Cash amounts donated to houses of worship, schools, other charitable organizations
  ☐ Records of non-cash charitable donations
  ☐ Amounts of miles driven for charitable or medical purposes

- **Medical Expenses**

  ☐ Amounts paid for healthcare insurance and to doctors, dentists, hospitals

- **Health Insurance**

  ☐ Form 1095-A if you enrolled in an insurance plan through the Marketplace (Exchange)
  ☐ Form 1095-B and/or 1095-C if you had insurance coverage through any other source (i.e. an employer, insurance company, government health plan such as Medicare, Medicaid, CHIP, TRICARE, VA, etc.)
  ☐ Marketplace exemption certificate (ECN) if you applied for and received an exemption from the Marketplace (Exchange)

- **Childcare Expenses**

  ☐ Fees paid to licensed day care center or family day care for care of infant or preschooler
  ☐ Wages paid to a baby-sitter
  Do not include expenses paid through a flexible spending account at work

- **Educational Expenses**

  ☐ Forms 1098-T from educational institutions
  ☐ Receipts that itemize qualified educational expenses
  ☐ Records of any scholarships or fellowships you received
  ☐ Form1098-E if you paid student loan interest

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- **Job Expenses & Tax Prep Fees [limited deduction 2018 thur 2025]**
  - ☐ Employment related vehicle expenses (tolls, mileage, gas, maintenance, license, property tax, interest expense, parking)
  - ☐ Receipts for classroom expenses (for educators in grades K-12)
  - ☐ Employment-related expenses (dues, education, publications, tools, uniform cost and cleaning, travel)
  - ☐ Job-hunting expenses
  - ☐ Record of moving expenses not reimbursed by employer
  - ☐ Amount paid for preparation of last year's tax return

- **State & Local Taxes or Sales Tax**
  - ☐ Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax paid
  - ☐ State refund amount – 1099-G
  - ☐ Invoice showing amount of vehicle sales tax paid

- **Retirement & Other Savings**
  - ☐ Form 5498-SA showing HSA contributions
  - ☐ Form 5498 showing IRA contributions
  - ☐ All other 5498 series forms (5498-QA, 5498-ESA)

- **Federally Declared Disaster**
  - ☐ City/county you lived/worked/had property in
  - ☐ Records to support property losses (appraisal, clean-up costs, etc.)
  - ☐ Records of rebuilding/repair costs
  - ☐ Insurance reimbursements/claims to be paid
  - ☐ FEMA assistance information
  - ☐ Check FEMA site to see if my county has been declared a federal disaster area

- **Prior Tax Returns**
  - ☐ Last Year's Federal and State Tax Returns [If prepared elsewhere]