



Eagle Wing Tax Service

6875 East Road, Saginaw, MI 48601 | Office: (989) 321-3795 | Mobile: (989) 497-8136
Eileen@EagleWingTaxSolutions.com | EagleWingTaxSolutions.com

Things To Bring

- _____ 1. All copies of W-2, 1099, 1098-T and K-1 forms
- _____ 2. All year end mortgage statements including those refinance or paid off during the year
- _____ 3. Social Security numbers and date of birth of all dependents
- _____ 4. Interest income from tax free investments
- _____ 5. 1099 forms reporting all stock sales as well as purchase date and cost information
- _____ 6. 1099 forms reporting unemployment compensation, state tax refunds and social security benefits
- _____ 7. 1099 forms for all retirement fund transfers and IRA activity
- _____ 8. Escrow statements for properties bought or sold during the year
- _____ 9. Prior year tax return for new clients only
- _____ 10. Completed itemized deduction checklist or organizer if supplied
- _____ 11. Schedule summarizing business or rental income and expenses
- _____ 12. Date, amount and copies of cancelled checks for each estimated tax payment
- _____ 13. Name, address and social security or ID number of all child care providers
- _____ 14. Any other documents you feel may be needed
- _____ 15. Voided check for direct deposit
- _____ 16. 1095 forms reporting proof of healthcare coverage

Medical

Insurance premium	_____
Prescriptions	_____
Doctor	_____
Dentist/orthodontist	_____
Lab/clinic	_____
Glasses/contacts	_____
Hospital	_____
Ambulance	_____
Miles driven for medical	_____

Contributions

Cash	_____
Merchandise donated	_____
Union dues	_____
Tools	_____
Uniforms	_____
Tuition/books	_____
Teaching supplies	_____
Property taxes	_____
License plates	_____

Income

Jury	_____
------	-------

Alimony	_____
---------	-------

Other: _____

