



United Way  
of Lapeer County

**Bring these documents to your  
free Tax Preparation Appointment.**



Name: \_\_\_\_\_

Appt. Date \_\_\_\_\_ Appt. Time: \_\_\_\_\_ Appt. Location: \_\_\_\_\_

If you **CAN NOT** make your scheduled appointment and/or need to reschedule, please call us so we can fill your spot from the wait list -- 810-667-2912 ext. 4

*Space is limited!*

### **Information About Our VITA Site:**

- You will have two meetings with our tax preparation team.
- Meeting 1 is drop off. We review your paperwork with you and then it is turned over to a tax professional. (approximately 30 minutes)
- Meeting 2, you will return to pick up your taxes. When you arrive, your return will be reviewed with you by one of our VITA-certified tax preparers. (approximately 15 minutes).
- If you need extra help getting forms downloaded from social security or consumers power, please let us know and we will have a specialist ready to assist you.

## **✓ FREE Tax Appointment Check List ✓**

- Government issued photo identification for you and your spouse (if married).
- Social Security cards for you, your spouse, and dependents. If no social Security Number: An Individual Tax Identification Number (ITIN) assignment letter may be substituted for you, your spouse and your dependents.
- Birth dates for you, spouse, and/or dependents.
- Wage and earning statement (Form W-2, W-2G, 1099-R, 1099-Misc from all employers).
- Interest and dividend statements from banks (Forms 1099).
- A copy of last year's tax returns.
- Letter 6419 – Advance Child Tax Credit Payments.
- Forms 1095-A, B or C Health Coverage Statements.
- Information for all other income (Social Security, VA, etc.) and all deductions (tuition/education, mortgage interest, charitable contributions, etc.)
- Medical or HMO premiums paid for self or dependents.
- Total paid for daycare provider and the daycare provider's tax ID number such as their Social Security number or business Employer Identification Number.
- Proof of bank account routing and account numbers for direct deposit. (such as a voided blank check.)

### ***BRING FOR MICHIGAN HOMESTEAD PROPERTY TAX CREDIT AND HOME HEATING CREDIT***

- Summer and winter property tax bills.
- Landlord's name and address and proof of rent paid.