



### **Full Checklist (Standard / Complex)**

*If you are unsure whether a document applies, please upload it anyway. I will review and determine if it is needed.*

#### **Common Tax Documents**

W-2(s)  
1099-NEC / 1099-MISC  
1099-INT / 1099-DIV  
SSA-1099 (Social Security)  
Unemployment (1099-G)

#### **Income Notes (If Applicable)**

Overtime earnings – report the eligible portion only (generally one-half of overtime earnings, if applicable)  
Include your last paystub of the year

#### **Housing & Living Expenses**

Mortgage interest statement (1098)  
Property tax statements  
Rental income & expenses (if you own rental property)

#### **Self-Employed / Side Income**

Income summaries  
Expense totals or spreadsheets  
Vehicle mileage totals

#### **Farm Income & Expenses (If Applicable)**

Farm income summaries  
Farm expense receipts or summaries (equipment, seed, feed, fertilizer, fuel, repairs, utilities)

#### **Vehicle Purchases (New Vehicles Purchased in 2025)**

Vehicle loan interest statement & Vehicle Year / Make / Model

## **Energy Efficient Improvements to Primary Residence**

### **Gambling Income & Losses**

Gambling winnings (W-2G or records)

Gambling losses (receipts, statements, or logs)

### **Family & Other Income (For Michigan Property Tax/ Rent Credit)**

Total rent paid in 2025 (amount)

Landlord name and address

Child support received (total amount)

Nontaxable income received (description and amount)

### **Education**

1098 T (tuition statement)

1098 E (student Loan Interest)

Upload using your secure link: <https://ahtaxinterview.taxwisemobile.com/>

Or scan QR code:



