

“2022” READINESS CHECK LIST

1. If new need cards showing Social Security Numbers and/or ITINs along with birth dates of all and proof of residency of dependents.
2. Need ALL W-2's, 1099's, and 1098's: those for interest, dividends, investments, tax refunds, self-employment, sales, pensions, IRA rollovers, unemployment, Social Security, 1099-A, 1099-C, and any other income along with those showing mortgage interest paid.
3. Need 1098-Ts with the financial transcript from the college showing 2022 education expenses plus cost of books and needed equipment.
4. **IMPORTANT: Bring your last pay statement & your last pension statement - contains necessary information.**
5. Any miscellaneous or other income and related expenses.
6. Contributions to “Traditional” and “Roth” IRAs & Health Savings Accounts, plus 1099-SA for HSA distribution.
7. Payments for health insurance, RX insurance, and DDS insurance.
8. **Property tax statements for both summer and winter 2022 as well as information giving 2022 taxable value of personal residence.**
9. Rent: Need name and address of landlord and amount of rent paid.
10. Use Tax: Purchases on which no sales tax was paid.
11. **E-file:** Need bank account number for direct deposit.
12. Copies of K-1's from partnerships, S Corporations, estates and trusts.
13. Business mileage – Bring start & end odometer readings for 2022 with business miles & interest paid on vehicle. Need miles separated from 1/1/22 to 6/30/22 & 7/1/22 to 12/31/22.
14. Year-end statements showing transactions from mutual funds/brokerage accounts. *Important:* need all pages
15. If you bought, sold or refinanced during the year, bring all closing statements.
16. If have foreign bank or retirement accounts, bring 2022 statements.
17. If IRA transferred directly to church or charity, bring proof.
18. Bring a record of the **dates** and **amounts** of any estimated tax payments made, and record of any other payments made.
19. **AFFORDABLE HEALTH CARE (ACA) (Obamacare)** You need to bring Form 1095-A if you bought insurance through the Marketplace.
20. **Please provide us with your email address if you have one. Will be used for appointment reminders.**



MARINE CITY CLIENTS WILL BE TAKEN CARE OF IN OUR ST CLAIR OFFICE: 817 CLINTON AVE, ST CLAIR, MI 48079

PHONE NUMBER 810-329-8818

Website: meredithtax.com