

**INSTRUCTION SHEET**  
**(This sheet should be printed as a reference guide)**

Forms can only be printed. We no longer have the option of fillable forms due to too many government regulations that are required for website security purposes. All the forms can be printed, filled out and sent to us. The most secure way is through our free app 'TAXESTOGO'. They can also be emailed to [xattax@DetroitIncomeTax.com](mailto:xattax@DetroitIncomeTax.com) or sent by US mail.

If you were our client last year, we should have sent you the information you need to fill out.

1. In the INSTRUCTION section, you MUST fill out the "Information Sheet." If you do not own or are paying for a home, condo, etc., fill out the renter area - if you are a Michigan resident or other state that has a rent credit.
2. Other forms we must have signed are:
  - a. The Engagement letter
  - b. Form 7216 (Consent to Use...)
  - c. Dependent questionnaire-if you are married and claiming dependents fill out the "Married Dependent Questionnaire." If you are not married and are claiming dependents, fill out the "Other Dependent Questionnaire." You also need to send us a signed copy of the "Earned Income Tax Credit and Child Tax Credit" explanation sheet.
  - d. A copy of your 1095A, 1095B 1095C or the signed copy of the "Health Insurance Confirmation" form.
3. If you have self-employment income go to the tab marked 'Self Employed' under the INSTRUCTIONS drop down menu. Find the form you need, print it, fill it out and send it to us.
4. If you have job related expenses that you think you can take, go to the tab marked "Job Related Expenses" under the INSTRUCTIONS drop down menu and at the bottom of the page click on the form that pertains to your occupation, print it, fill it out and send it to us.
5. If you are planning to itemize, go to INSTRUCTIONS and under item 2 click on "Itemizing Information"; print it, fill it out and send it to us.
6. We MUST have copies of your (and spouse's if married) current (unexpired) Driver's License or other government issued photo identification.
7. We MUST also have a copy of your social security card (and spouse's, if married) on file, along with the social security cards of all of the dependents on your tax return. If you are not sure that we have them in our system, send them again.
8. We also need copies of any W2 forms, 1099 forms and any other information relating to the preparation of your tax return.
9. If you are claiming college expenses for anyone on your tax return, we MUST have the form 1098-T from the school and also a printout of all fees the school charged and payments that were made to the school in 2016.