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Items needed for 2020 Personal Income Tax Return

Please provide **photocopies** of the following information for us to complete your 2020 Income Tax Return. **Please do not send the originals to us.** We ask that you retain the originals in a safe place in your possession in case questions arise or further information is needed from them in the future.

General information

- 1) Refer to the Basic Taxpayer Organizer.
- 2) Copies of last two years Federal & State tax returns. **If we prepared your returns, there is no need to send copies.**

Income information

- 1) Copies of all W-2 forms that you or your spouse may have received from your employer(s).
- 2) Copies of 1099 forms that you may have received for other income.
- 3) Copies of 1099-INT or 1099-DIV forms that show interest or dividend income.
- 4) Copy of last year's state tax refund.
- 5) Distributions from a Health Savings Account.
- 6) Distributions from IRA, 401(K) or other retirement accounts.
- 7) Documentation on capital gains you may have had through asset sales in 2020.
- 8) Unemployment compensation
- 9) Social Security benefits received.
- 10) Any other types of income you may have for 2020.

Adjustments to Income

- 1) Contributions to a Health Savings Account.
- 2) Moving expenses.
- 3) Contributions to SEP, Simple or other qualified plans.
- 4) Premiums paid for self-employed health insurance.
- 5) Alimony paid.
- 6) IRA contributions for 2020.
- 7) Student loan interest paid.
- 8) Tuition and fees paid for college education.

Itemized deductions

- 1) Medical expenses (doctors, dentists, eyeglasses, prescriptions, employee health insurance premiums, etc.)
- 2) Real estate taxes paid.
- 3) Personal property tax paid (automobiles, etc.)
- 4) Mortgage interest paid on your residence (Form 1098 or other documentation).
- 5) Points paid on your residence.
- 6) Charitable contributions by cash or check.



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Itemized deductions (continued)

- 7) Charitable contributions made in kind (clothing, automobiles, furniture, etc.)
- 8) Casualty losses from theft or fire.
- 9) Unreimbursed business expenses.
- 10) Legal fees.
- 11) Tax preparation fees.
- 12) Safety deposit box fees.

Other deductions and credits

- 1) Child and dependent care costs.
- 2) Credit for elderly or disabled.
- 3) Residential energy credit for improving the efficiency of your home.
- 4) Taxes paid to foreign country.

Payments

- 1) Documentation of payments or estimated payments that you may have made toward your 2020 taxes. (does not include amount paid with 2019 return for additional taxes owed for 2019)

If you owned a business that could be considered a sole proprietorship in 2019, we need the following information to complete the Schedule C for your tax return:

- 1) What activity the business was engaged in.
- 2) Total revenue earned by the business in 2020.
- 3) Categorized expenses incurred by the business in 2020.
- 4) Total miles and total business miles driven for the year.
- 5) Information on a home office if one was used.
- 6) Any depreciable assets used by the business. (computers, office furniture, etc.)

If you personally owned rental properties in 2020, we need the following information for your Schedule E:

- 1) Address and location of new properties.
- 2) Amount paid for the new properties purchased.
- 3) Rental income for the individual properties.
- 4) Cost of any improvements made to the properties.
- 5) Expenses for the maintenance and operation of the properties.
- 6) Information as to whether or not you can be considered a real estate professional. (the greater of 750 hours **and** more than 50% of your personal services, if you have another job, devoted to working in real estate activities for 2020)
- 7) HUD Statements (closing statements) on any property purchased in 2020.

Thank you for allowing us to assist you in this process.