



# INDIVIDUAL INCOME TAX PREPARATION CHECKLIST

## In 2020, did you (or your spouse) receive income from any of the following:

- Wages – **W2(s)**
- Interest or Dividends – **1099 Div or Int**
- Retirement or IRA Distribution – **1099 R**
- Partnership or S-Corporation – **K1(s)**
- Unemployment – **1099 G**
- State Income Tax Refund
- Alimony
- Social Security Benefits – **1099 SSA**
- Operating a Business or Farm /Self Employment
- Own or receive income from rental property
- Have gambling winnings and losses
- Royalties – **K1(s) or 1099 Misc or 1099 NEC**
- Any Other Income – **1099 Misc or 1099 NEC**
- If you received health insurance through the MarketPlace (ObamaCare) we must have your Form 1095A to file your return**
- If you received a stimulus payment in 2019 or 2020 you should have received an IRS Form 1444 and/or Form 1444-B**

## In 2020, did you (or your spouse):

- Contribute to an IRA, SEP, or Keogh Plan
- Have a foreign bank or securities account
- Pay interest on student loans
- Pay for post-secondary education – **1098 T**
- Have a home mortgage, a second mortgage or a home equity loan – **1098**
- Pay real estate taxes – **Tax Statement or 1098**
- Pay medical expenses and/or private health or Long-Term Care insurance premiums
- Make contributions to a charity or church  
\$499+ in non-cash items must be documented
- Suffer a casualty loss in a federally declared disaster area
- Receive an inheritance
- Pay alimony
- Pay child or dependent care expenses
- Send payments to IRS for 2020 taxes
- Cash in a Life Insurance Policy or Annuity
- Receive any letters or notices from the IRS
- Did you buy or refinance a personal residence in 2020?** (HUD Closing Statement)

## In 2020, did you (or your spouse) sell or dispose of any:

- Stocks, Mutual Funds or Bonds – **1099 B**
- Personal Residence – **HUD Closing Statement**
- Rental Property or Other Personal Property  
If so are you receiving installments payments?

### NEW IRS REQUIREMENTS

You **must** have documentation proving that the child(ren) listed on your Tax Return resided with you in 2020 order to claim EIC, Child Tax Credit and/or American Opportunity Tax Credit.

#### Acceptable documents include:

- School Records or Statement
- Landlord or Property Management Statement/Lease Agreement
- Health Care Provider Statement
- Medical Records
- Child Care provider records
- Placement agency statement
- Social services records or statement

Social Security number and date of birth are required for all individuals listed on your tax return. **(New clients need to bring Social Security Cards to appointment)**

You have until 4/15/21 to establish 2020 IRAs (Traditional, Roth, SEP and Coverdale).

Make Your Appointment  
Online or Call

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