

2020 Information Checklist

This is a list of the most common items we will need to finish your returns. We will call you if we need anything else.
(You do not need to return this to us; unless you make notes we should be aware of.)

- Complete Client Questionnaire

- All return packets or mailing labels sent to you by the various taxing agencies

- All W-2's

- All 1099 forms received confirming income from interest, dividends, retirement, social security, disability, unemployment, gambling winnings, etc.

- All information for children if you want us to prepare their required returns

- Proof of health insurance coverage for all individuals claimed on your tax return

- Year-end statement of mortgage interest (Form 1098), escrow activity and balance on mortgage or home equity loans and real estate taxes paid

- Total of all receipted charitable contributions and details for any non-cash contributions over \$500

- Copies of all LLC, Partnership or S-Corporation K-1's (send separately later if everything else is ready, and let us know it's coming)

- If you bought, sold or refinanced real estate, please provide closing statement for each transaction

- If you sold any shares of mutual funds and basis information is not provided by the broker, detail all activity in the funds sold from original purchase date through date of sale (year end summary statements are ideal)

- If you are claiming auto mileage as a deduction for business, rental properties or unreimbursed employee expenses, we need to know: total miles, commuting miles, and business miles driven for the year

- If you lease your car or are deducting actual expenses, please also provide: original value of the car (what you could have bought it for) and date of lease, as well as all expenses for lease payments, gas, car washes, licenses, insurance, tires, repairs, etc.

- Copies of any federal, state or local tax correspondence during the year, including all payments made or refunds received.

- All legal documents for formation, sale or purchase of a business during the year

- All legal documents for divorce decrees

- Voided Check for account where refunds also should be direct deposited (optional)

- New Client: copies of prior federal, state and local returns and depreciation schedules if applicable. (at least one year, preferably three)**