

# 2020 Short Checklist

Client Name \_\_\_\_\_ Date \_\_\_\_\_

Phone Number/Numbers \_\_\_\_\_

Email Address \_\_\_\_\_

Amount of Stimulus Received 1) \_\_\_\_\_ 2) \_\_\_\_\_

Did you buy/sell/trade/receive Virtual Currency / BitCoin \_\_\_\_\_

Did you withdraw IRA funds because of CORNAVIRUS? \_\_\_\_\_

Total number of pages provided AccuraTax \_\_\_\_\_

## NEW CLIENTS – ACCURATAX NEEDS A COPY OF 2019 TAX RETURN

List the number of each type of form you provided for tax prep.

- \_\_\_\_\_ W2 Forms
- \_\_\_\_\_ 1099\_MISC (Contract Work)
- \_\_\_\_\_ 1099-INT
- \_\_\_\_\_ Last year's State Refund Card
- \_\_\_\_\_ Unemployment (Form 1099-G)
- \_\_\_\_\_ Retirement Benefits (1099-R)
- \_\_\_\_\_ Social Security Benefits received
- \_\_\_\_\_ Daycare Forms
- \_\_\_\_\_ College Education loan form
- \_\_\_\_\_ College Education 1098T
- \_\_\_\_\_ 1098 (House Interest)
- \_\_\_\_\_ Property tax statement
- \_\_\_\_\_ New Vehicle Purchase in 2020
- \_\_\_\_\_ Cash contributions paid to Non-Profits
- \_\_\_\_\_ Gift contributions given to Non-Profits
- \_\_\_\_\_ Medical Expenses
- \_\_\_\_\_ HSA Contribution Form
- \_\_\_\_\_ HSA Distribution Form
- \_\_\_\_\_ Long Term Care Form
- \_\_\_\_\_ 1099-B if you sold mutual funds or stock

## ADDITIONAL INFORMATION

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\_\_\_\_\_

For Office Use Only

Dependent Notes \_\_\_\_\_

Direct Deposit \_\_\_\_\_ Hard Copy \_\_\_\_\_

**AccuraTax LLC Tax and Bookkeeping**

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