



SSN:

**Checklist**

This checklist is provided to help you gather necessary information for us to prepare your 2020 income tax return.

This year, due to the state of New Mexico Health mandates, the safety of our team, yourselves, and of the community, we will be limiting in-person contact with the help of technology and the use of our App. If you have not signed up for our App and wish to do so, please contact Brandon at (505) 865-1040 or Brandon@PillarCPAs.com, and he will guide you through the process.

If you must drop off any document at our office, we ask that you schedule a time through our website ([www.PillarCPAs.com](http://www.PillarCPAs.com)) to ensure contactless drop-off and pick-up. Safety is of the utmost importance for everyone during these unprecedented times.

**Economic Impact Payment**

Notice 1444

**Wages (Form W-2)**

Form W-2

**Gambling income (Form W2-G)**

Form W-2G

**IRA distributions, pensions, and annuities (Form 1099-R)**

Form 1099-R

**Dividends (Form 1099-DIV)**

Form 1099-DIV

**Interest (Form 1099-INT)**

Form 1099-INT

**State and city refunds and other government payments (Form 1099-G)**

Unemployment compensation

Form 1099-G

**Social Security benefits (Form 1099-SSA)**

Form 1099-SSA

**Railroad Retirement Benefits (Form 1099-RRB)**

Form 1099-RRB

**Partnerships, S Corporations, Estates, and Trusts (Schedule K-1)**

K-1 From Partnerships, Sub-Corporations, Fiduciary

**Brokerage transactions and disposition of capital assets (Form 1099-B)**

Form 1099-B

**Self-employed Income (Schedule C)**

Schedule C

**Farm Income (Schedule F)**

Schedule F

**Farm Rental Income (Form 4835)**

Form 4835

**Rent and Royalty Income (Schedule E)**

Schedule E



SSN:

**Checklist****Other Income (provide supporting documentation for income received for the following items)**

- Sale of assets or property
- Cancellation of debt
- Other income \_\_\_\_\_

**Payments (provide supporting documentation for payments made for the following items)**

- Educator classroom expenses
- Employee business expenses
- Contributions to a Health Savings Account
- Expenses related to work relocation
- Alimony
- Student loan interest
- Tuition and fees for higher education
- Expenses related to child or dependent care
- Contributions to a Retirement Savings Account
- Medical and dental expenses
- Real estate taxes
- Other state and local taxes
- Mortgage interest
- Investment interest
- Cash Contributions
- Noncash Contributions
- Unreimbursed employee expenses
- Investment expenses
- Gambling losses
- Other payments \_\_\_\_\_



**Personal Information**

Name		SSN	Has IP PIN	Date of birth
Taxpayer				
Spouse				
Street address, city, state, and ZIP				
Occupation		Cell Phone and carrier		
Taxpayer				
Spouse		We will text message you on the above phone number		
Email	Deliver to me:	App/Email	Paper Packet +\$25	Mail Packet +\$40
Business Name	EIN:			

**Marital Status at end of 2020**

- Married
- Married filing separately
- Single
- Widow(er) If spouse died in 2020 enter the date of death \_\_\_\_\_

**Other information**

- Are you blind?  Yes  No
- Are you disabled?  Yes  No
- Are you a full-time student?  Yes  No
- Do you want \$3 to go to the Presidential Election Campaign Fund?  Yes  No

**Taxpayer**

- Yes  No
- Yes  No
- Yes  No
- Yes  No

**Spouse**

- Yes  No
- Yes  No
- Yes  No
- Yes  No

At any time during 2020 did you receive, sell, send, exchange, or acquire any financial interest in any virtual currency?  Yes  No

**Dependent Information**

First and last name SSN	Has IP PIN	Relationship	Months in home	Date of birth	Disabled	Full-time student	Childcare Expenses

List dependents required to file a return \_\_\_\_\_

**COVID-19 Implications**

Yes No

- Did you receive an Economic Impact Payment (EIP)?  
If "Yes," provide Notice 1444 from the IRS.
- Did you experience economic loss due to COVID-19 (loss of job, closed business, etc.)?
- Were you unemployed for any portion of the year due to COVID-19?
- Did you continue to receive wages from your employer even if you were unable to work?
- Did you receive a distribution from a retirement plan (401K, IRA, etc.) due to COVID-19?
- If you own a farm or business, did you continue to pay any employee while they were not working?
- If you own a farm or business, did you delay withholding FICA taxes from any employee's pay?
- If you own a farm or business, did you receive a Paycheck Protection Program (PPP) loan?  
If "Yes," was the loan forgiven or have you applied for forgiveness? \_\_\_\_\_
- If you own a farm or business and were unable to work due to COVID-19, would you have qualified for sick or family leave if employed by someone other than yourself?

**Appointment Information**

Your 2020 drop off scan is scheduled for \_\_\_\_\_