2020 TAX PREP

CHECKLIST

# ALL TAX FILERS

W2’s and/ or 1099s

SS#/Birth certificate for dependents (unless in our system from prior year)

Our office forms

1095-A If Covered CA insurance.

# Home Owners

Mortgage Interest

Property taxes

Car registration

Charitable donations

Interest and Dividend income

Contributions

# Business owners

Income total and/or 1099s

Expense listing and totals

K1

Mileage totals: Personal and Business

Prior year tax return if new client.

***\*\*INDICATE WHAT IS INCLUDED AND SUBMIT CHECK LIST WITH FORMS\*\****

# unemployement/Stimulus payments

Total amount of Stimulus received

Federal and State unemployment benefit forms

# Additional Items if applicable

1098-T for qualifying education

IRA/HSA forms

Social Security payment forms

Student loan interest

Securities Sale Forms

Prior year tax return if new client and long form.