

# 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.

## UNEMPLOYMENT/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.

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