

Items Needed to Complete Your 2020 Tax Return

Name: _____

Address: _____

Email: _____

Phone: _____

_____ All W-2's & Unemployment Tax Statement (1099G)

_____ All 1099's for Retirement Account(s)

_____ Tax statement(s), Form 1099's, for Dividend(s)

_____ Tax statement(s), Form 1099's, for Interest

_____ Stock & investment yearly information, Form 1099 statement(s) & stock basis information

_____ All Cryptocurrency/Bitcoin activity

_____ Rental income Property - Income & Expenses (see checklist on the back)

_____ Self Employed - Income & Expenses (see checklist on the back)

_____ Closing Statements for purchase & sale of residence

_____ Mortgage interest statement(s), Form 1098

_____ Property taxes paid on the residence

_____ Form 1098-T for education credit for higher education

_____ All student loan interest statements for interest paid during the year

_____ Job related expenses - Dues, Uniforms, etc. (for PA & local returns)

_____ Home office expenses.

_____ Changes in Dependents.

_____ Last Paystub received from each job in 2020

_____ Form 1095 A, if you have received a tax credit from the insurance market place.

(New for 2020, up to \$300 is deductible even without itemizing)

_____ Charitable Donations Please provide documents

_____ Energy efficient home improvements. (Appliances not applicable) Please provide documents



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If you are unsure if the document(s) are needed for the preparation of your tax return, please include the document(s) with the information you drop off.

Rental
Income & Expenses Checklist

PROPERTY	KIND AND LOCATION	Acquired Mo - Yr	COST
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INCOME	PROPERTY
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RENTS RECEIVED

OTHER INCOME

EXPENSES

ADVERTISING

AUTO AND TRAVEL - MILES

CLEANING AND MAINTENANCE

COMMISSIONS

INSURANCE

LEGAL & PROFESSIONAL

MORTGAGE INTEREST PAID TO BANKS ETC

OTHER INTEREST

CARPENTRY

FURNACE

PAINTING

PLUMBING

REPAIRS OTHER

LIST IMPROVEMENTS SUCH AS NEW ROOF *add'l comments*

SUPPLIES

TAXES

ELECTRICITY

FUEL

UTILITIES WATER/SEWER

YARD/SNOW REMOVAL

OTHER

WHAT % OF PROPERTY WAS RENTAL %

additional comments

Self Employed
Income & Expenses Checklist

Total Sales

Inventory / Materials

Purchased

Inventory at
12/31/2020

Shipping Fees

Postage

Education

Business Mileage

Total Mileage

Travel Expense

Meals

Telephone

Utilities

Internet Expense

Clients Gifts

Dues & Subscriptions

Tools

Equipment

Rent

Insurance

Legal & Professional Fees

Office Expense

Repairs

Supplies

License

Bank Fees

Subcontractors

Credit Card Fees

Intrest