

2020 Checklist

Taxpayer	Spouse	Dependent(s)	Basic Information
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|--------------------------|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Name, SSN or ITIN, and Date of Birth |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Last Year's Return; Hard Copy or PDF File |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Estimated Taxes Paid |

Taxpayer	Spouse	Dependent(s)	Documents Received
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| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Forms W-2; Wages and Tax Statements |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Forms 1095; Includes Health Insurance Marketplace Statement (1095-A), Health Coverage (1095-B) and Employer-provided Health Insurance Offer and Coverage (1095-C) |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Forms 1098; Includes Mortgage Interest (1098) and Student Loan Interest (1098-E) |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Forms 1099; Includes Dividend Income (1099-DIV), Interest Income (1099-INT & 1099-OID), Merchant Card and Third Party Network Payments (1099-K), Miscellaneous Income (1099-NEC or 1099-MISC), Retirement Plan Distribution (1099-R), Sale of Home or Real Estate (1099-S), Capital Gain Transactions (1099-B), Distributions from an HSA, Archer MSA or Medicare Advantage MSA (1099-SA), Unemployment Compensation (1099-G), Stimulus Payments |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Forms 2439; Notice to Shareholder of Undistributed Long-term Capital Gains |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Schedule K-1(s); Partnership, S Corporation, and Estate or Trust Income |

Taxpayer	Spouse	Dependent(s)	Personal Records
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|--------------------------|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Child and Dependent Care Expenses |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Education Expenses |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Medical Expenses |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Vehicle (Personal Property) Taxes Paid |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Real Estate Taxes |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Mortgage Interest Paid |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Charitable Contributions |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Business Farm or Rental Income/Expenses |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Unreimbursed Partnership Expenses |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Employee Expenses |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Gambling Expenses |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Investment Transactions |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Retirement Plan Contributions |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Foreign Earned Income and Foreign Taxes Paid |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Energy Efficiency Property Expenses |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Alimony Expenses and/or Income |

Taxpayer	Spouse	Dependent(s)	E-File/Print
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|--------------------------|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Bank Information (Accounting & Routing Number for Direct Deposits/Withdrawal) |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Prior year's Self-Select PIN or Prior year's AGI (Adjusted Gross Income), Prior year Identity Theft PIN |

Notes	*Please notify us of e-mail or address changes
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