Susan Does Taxes LLC

ACCOUNTING, PAYROLL, & PERSONAL TAX SOLUTIONS

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2020 TAX YEAR PREPARATION SHEET

The following items are not inclusive, nor do they apply to every taxpayer's filing(s). It simply serves to remind individuals of forms that can/will impact any submission sent to federal, state, or local tax officials.

Personal Information:
Full name & social security numbers for self, spouse, & all dependents
State issued photo id for all individuals filing (primary, spouse, and any filing dependents)
Prior Years' Tax Returns (if not prepared by Susan in prior years)
Childcare provider tax ID or Social Security Number & Address (include camps & babysitters)
529 contribution beneficiaries' Social Security Number(s)
Death Certificate copy for loss of spouse in the tax year or the prior year

Employment & Income Data:
W2's for all jobs worked during tax year
Partnership & trust income (Form K-1)
Pensions & annuities (1099-R)
Alimony received if divorce settled prior to January 1, 2019
Jury duty payment
Gambling & lottery winnings/losses (Form W-2G)
Prizes & awards
Scholarships & fellowships
State & local income tax refund (Form 1099-G)
Unemployment compensation (Form 1099-G)
2020/2021 Economic Impact (Stimulus) Payments

Homeowner/Renter Data:
Residential address(-es) for the tax year
Mortgage interest (Form 1098)
Sale of home or real estate other than primary residence (Form 1099-S)
HUD settlement statements from sale/purchase of new/old property
Second mortgage interest paid statements (Form 1098)
Real estate taxes paid (include county, borough, school, etc.)
Rent paid during tax year & name of landlord
Moving expenses for military families

Financial Assets:
Interest income statements (Forms 1099-INT & 1099-OID)
Dividend income statements (Form 1099-DIV)
Proceeds from broker transactions (Form 1099-B)
Cost basis of stocks sold in the tax year (from broker statements)
Miscellaneous income including rent & non-employee compensation (Form 1099-MISC)
Retirement plan distribution (Form 1099-R)

(***continued on page 2***)

Financial Liabilities:
Auto loans & leases (invoice with car value & lease/finance payments) for vehicle(s) used for business
Student loan interest paid
Early withdrawal penalties on CDs & other time deposits

Automobiles, Boats, Snowmobiles, Trailers etc.:
Personal property tax information (registrations)

Expenses:
Charitable donations & separate total for non-cash donations; receipts required for all donations
Unreimbursed expenses related to charity/volunteer work
Unreimbursed expenses related to your job (include travel expenses, entertainment, uniforms, union dues, subscriptions, & mile-age to second job or multiple work sites)
Investment expenses
Job-hunting expenses
Education expenses
Childcare expenses
Medical savings accounts statements
Adoption expenses
Alimony paid if divorce settled prior to January 1, 2019
Tax return preparation expenses & fees

Self-Employment Data:
K-1 on all partnerships
Receipts/documentation for business-related income/expenses
Farm income documentation
1099 Miscellaneous received

Deduction Documents:
State & local income tax & estimated tax paid
IRA, Keogh, & other retirement plan contributions
Medical expenses

Remember: *Whether utilizing our contactless drop box or Secure File Pro (Portal), we will need images of your state photo ID, birthdates, Social Security numbers, and full name for all dependents and individuals filing. Photocopies, scans, or digital images taken with a smartphone can be used.*