Allied Accounting Services, Inc. 2020 Tax Preparation Checklist

Please bring all items with you to your appointment

Email Address:____

- __________ New Clients-copy of last 2 years of tax returns
- __________ New Clients-social security number and dates of birth for all family members
- __________ Copy of taxpayer and spouse driver license
- __________ Voided check or Bank routing and account number for direct deposit
- __________ W-2 wage tax forms
- __________ 1099-INT for bank or investment income
- __________ 1099-DIV for dividend income
- __________ 1099-B for proceeds from brokerage sales and annual statements
- __________ Investment information on cryptocurrency
- __________ 1099-R for Pension, Retirement, IRA and Annuity distributions
- __________ 1099-SS or 1099-RRB for Social Security or Railroad Retirement income
- __________ 1099-G for Unemployment or prior year State and Local tax refunds
- __________ Self Employed income and expenses - **See Self Employed Checklist**
- __________ Rental income and expenses - **See Rental Property Checklist**
- __________ Farm income and expenses - **See Farming Checklist**
- __________ 1099-MISC for other income
- __________ W-2G for gambling and lotto winnings and documentation of losses
- __________ 1099-A and/or 1099-C for cancelled debt
- __________ 1099-Q for money received from education accounts
- __________ 1099-S and settlement statements for sales of Home or Vacation property
- __________ Alimony payments or income received
- __________ Child support received
- __________ Jury Duty pay
- __________ Economic stimulous payment
- __________ Educator Expenses
- __________ IRA, HSA, SIMPLE and SEP contribution amounts
- __________ 1099-SA for HSA and MSA distributions
- __________ Moving expenses if a member of the Armed Forces
- __________ 1098-E or statement for student loan interest payments
- __________ 1098-T and costs for education expenses for you, your spouse and your dependents
- __________ Child care costs with the child care provider's name, address and EIN or SS number
- __________ Receipts for cost of solar and/or wind energy efficient home improvements
- __________ 1095-A, for health insurance coverage and premium tax credits
- __________ Copies of checks or Listing of dates and amounts paid for Federal, State and City estimated tax payments
- __________ Renters provide the rent amount paid for the year along with the landlord name and address
- __________ Cash and non cash charitable contribution receipts
- __________ Casualty and theft losses on personal property

Include items below if they total more than $12,000 for singles or $24,000 for married filing joint

- __________ Doctor, Dentist, Lab, Hospital, Prescriptions, Eyewear, Health insurance, long term care
  and all other medical costs including mileage that exceeds 7.5% of income
- __________ State and local real estate taxes paid on all property
- __________ License plate fees paid on all personal property
- __________ 1098 for Mortgage Interest
- __________ Settlement statement if you purchased or refinanced your home