



Online Tax

2020 Tax Prep Checklist

Copy of Last Year's Tax Return (if you are a new client)

General Taxable Income

- Alimony Received or Paid
- Dividend Income Statements: Form 1099-DIV
- Interest Income Statements: Form 1099-INT & 1099-OID
- Miscellaneous Income: Form 1099-MISC
- Sales of Real Estate: Form 1099-S
- Sales of Stock, Land, etc.: Form 1099-B
- State Tax Refunds: Form 1099-G
- Unemployment Compensation Received
- W-2 Form(s) for Wages, Salaries, and Tips
- Sale or exchange of virtual currency
- Federal, State or other Pandemic Assistance and/or grants

Retirement Income

- Railroad Retirement & Social Security Income: Form SSA-1099
- Retirement Income: Form 1099-R

Business Income

- Business Income and Expenses
- Farm Income and Expenses
- Form K-1 Income from Partnerships, Trusts, and S-Corporations
- Rental Income and Expenses
- Tax Deductible Miles Traveled for Business Purposes

Tax Credits Checklist

- Adoption Expense Information
- Child Care Provider Address, I.D. Number and Amounts Paid
- First Time Home Buyer Tax Credit
- Foreign Taxes paid

Expense and Tax Deduction Checklist

- Amount Paid to Professional Preparer Last Year
- Casualty and Theft Losses
- Charitable Cash Contributions
- Doctor and Dentist Payments
- Fair Market Value of Non-cash Contributions to Charities
- Home Mortgage Interest from Form 1098
- Home Second Mortgage Interest Paid
- Hospital and Nurse Payments
- Investment Expenses
- IRA Contributions
- Job-hunting Expenses
- Last Year's Tax Preparation Fee
- Medical Expenses for the Family
- Medical Insurance Paid
- Miles Traveled for Volunteer Purposes
- Miles Traveled for Medical Purposes
- Miles Traveled Related to Your Job
- Moving Expenses
- Personal Property Taxes Paid
- Prescription Medicines and Drugs
- Real Estate Taxes Paid
- State Taxes Paid with Last Year's Return (if itemized)
- Student Loan Interest Paid
- Tax Deductible Unreimbursed Expenses Related to Your Job
- Union and Professional Dues
- Unreimbursed Expenses Related to Volunteer Work