2020 Tax Appointment Worksheet

Please bring in the suggested documentation for the events that may have occurred in the past year.

EVENT	DOCUMENTS OR INFORMATION NEEDED
Married, Divorced or Separated	• Married-prior year return of both spouses • Divorced-finalized date; copy of divorce decree • Separated- copy of separate maintenance agreement • Community property income allocation
Children Birth or Adoption	• Social Security Cards and adoption papers
Death of child or spouse	• Date of Death
Additional members of household	• Date of occupancy and relationship
Job Change	• Start Date • Name of employer • W-2s from new and old employers
Business Income	• W-2's,1099's or K-1's
Retirement Distribution	• Form 1099R; rollovers • RMD information if 70.5 or older • Direct transfer to charity? And amount • Brokerage statement showing transfer
Unemployment	• Unemployment form, 1099-G
Sale of stocks, bonds, etc., (including mergers)	• Form 1099-B or other sale documents • Basis or original costs
Social Security Benefits	• Form 1099-SSA
Prizes	• Form 1099-Misc; value of prizes not included on form 1099-Misc
Lottery of gambling winnings	• Total amount won whether on W-2G or not • Total amount of losses
Inheritance	• Will, K-1 from the estate • Basis information
Gifts received	• Property- Basis donor
Trade of real property	• Date trade, property given up and property received, basis and FMV • Qualified intermediary sales agreements or closing papers
Lawsuit settlements	• Date received, reason for the settlement • 1099-Misc
Start or end a small business (Schedule C, LLC, S or C Corp, partnership)	• Formation or termination dates • Property contributions or distributions • K-1's if applicable

Rental Property	• Income • Expenses • New property purchased
Retirement Contribution	• Type of plan • Amount of contribution
Purchase of stocks, bonds, etc., personal residence, or other real estate	• Purchase documents; closing papers
Gifts made	• Cash or property in excess of 15,000 per person • Description of property given, basis, done name
Health insurance, medical, dental or drug expenses (verification of 1095A, B or C for every person on tax return)	• Health insurance premiums; post-tax payments • Totals of other medical, dental, and drug expenses • Health savings account (HSA) information
Medical miles	• Total medical miles driven during the year
Business Expenses	• 1099-Ks received for use of credit cards • Inventory numbers
Business miles (businesses and rentals only)	• Total miles driven per vehicle • Business miles driven per vehicle
Charitable Contributions of money, property, or out of pocket expenses	• Date and type of contributions, knowledge that receipts from the organizations have been received • Statement regarding whether goods and services were received for donation • Mileage log for charitable work • Form 1098-C for vehicles or boat donations
Charitable miles	• Total charitable miles driven
Transfers from IRA to charity for taxpayers over age 70.5	• Brokerage statement showing transfer • 1099-R
Student loan interest	• Interest record for student loans • Form 1098-E
Education Expenses	• Form 1098-T for parents or children if the child is a student • Actual expense record to verify expenses for credit/deduction purposes • Financial transcript from school showing when actual expenses were paid
Adoption credit	• Expenses date and amount, date of adoption • Special needs certification
Child Tax Credit, EIC, HH	• Proof child lives in household

Energy Credit	• Information regarding the purchase of solar or small wind energy property business or residence
Foreign investments or holdings	• Any foreign accounts • Accounts exceeding $10,000 during the year • Foreign business interests or stock of $50,000 or more • Signature authority over foreign accounts
State taxes income, property taxes paid; sales tax paid on vehicles, motorcycles or homes	• Prior year's income tax return; property tax bills; closing papers from the purchase or sale of property • Letter from the state regarding any change in a prior-filed return
Home mortgage interest	• Forms 1098 • Description of use of money
First time homebuyer	• Distribution from IRA? • Amount?
Recapture/repayment 2008 credit	• Sale or change in use • Record of amount paid • Year 9 to 15
Child or disabled spouse care	• Name, address, and ID number of day-care provider • Amount paid to provider • W-2 if provider comes into home
Bankruptcy filing	• Date filed • Bankruptcy papers-properly rejected/returned by court
Debt forgiveness or abandonment of property	• Form 1099-A for abandonment • Date property was taken by the bank or sold in foreclosure • Form 1099-C for cancellation
IRS or State communications IRS Notice 1444 for those who received a stimulus check	• Letters, additional taxes paid, changes in prior pear returns • Installment agreements or offers in compromise