



2020 Tax Return Checklist

The checklist represents common types of income and expenses identified by the IRS Form number. If a particular item applies to you, simply check the box and attach the supporting documentation.

Income

- W-2 (Wages)
- 1099-INT (Interest income)
- 1099-DIV (Dividend income)
- Foreign bank accounts, income +/- paid taxes
- 1099-B (Stock sale/capital gains)
- Number of shares, date, & amount paid
- 1099-R (Pension distributions)
- State/local refunds
- W-2G (Gambling income)
- Schedule K-1 from Partnership, S Corp or Trust

Small Business

Self-employed or independent contractor business owner

- 1099-NEC (Business income)
- 1099-MISC (Business income)
- Income not reported on Form 1099-NEC
- Itemized business expenses—Request Organizer
- Vehicle information

Real Estate

- 1099-S (proceeds from property sale)
- HUD-1 (for both the purchase and sale of the sold property)
- Itemized additions/improvements
- 1099-C or 1099-A (Forgiveness of debt income)
- 1098 (Mortgage interest)

Deductions/Adjustments

- 5498 (IRA, Roth IRA, SEP, SIMPLE IRA contributions)
- 1098-E (Student loan interest)
- 1098-T (Tuition statements)
- 1099-INT (Penalty or early withdrawal of savings)
- Alimony paid (Provide recipient name, SS# and date of original divorce or separation)
- Moving expenses (Armed forces only)
- Margin interest as reported by brokerage firm
- Cash and non-cash charitable contributions
- Casualty/theft loss

Children

- Child Care expenses
 - Provider Name, address, SS#, and amount
- Legal papers for adoption, divorce or separation that involves custody of dependent children

Other Income

- Stimulus payment (report \$0 if not received)
- Alimony received (include date of original divorce or separation)
- 1099-G (Unemployment, state tax refund)
- SSA-1099 (Social Security benefits)
- Disability income
- 1099-MISC (Jury duty)
- Tip income
- 1098-T (Scholarships)
- 1099-Q (Education savings account withdrawal)
- 1099-B (Bartering income)
- 1099-MISC/CCC1099-G/1099-PATR (Farm income)

Rental Property

- 1099-MISC (Rental income)
- Income not reported on Form 1099—MISC
- Related Expenses—Request Organizer

Tax Payments

- Estimated tax payments (Dates and amount)
- Real estate taxes
- Other taxes – sales tax paid for auto, boat and RV purchases

Other Expenses

- Educator expenses (K-12 only)
- 5498-SA (health savings account contributions)
- Energy or vehicle tax credit information
- Business expenses of reservists, performing artists, and fee-based government officials and partners and S Corp shareholders
- State/local income taxes (amount & date paid) *
- 1098 (real estate taxes, home mortgage interest, mortgage insurance premiums) *
- Personal property, ad valorem, and other taxes *

Medical Expenses

- 1095-A
- 1099-SA (spending from HSA)
- Out-of-pocket medical expenses
- Healthcare Marketplace exemption
- Self-employed health insurance

* combined personal state and local income taxes, real estate taxes, and other taxes are limited to \$10,000