

To assist in the preparation of your 2020 income taxes, please gather the following documents:

Description	Yes	No	Document
INCOME			
Did you earn wages or receive a W-2?			W-2
Did you earn any interest or dividend income?			1099-INT, 1099-DIV or 1098 Brokerage Statement
Did you sell any stock during the year?			1098 Brokerage Statement
Did you receive any retirement income (pension, IRA distribution)?			1099-R
Did you receive any social security income?			1099-SA
Did you receive any K-1s from a partnership, S Corp, Estate or Trust?			Schedule K-1
Did you receive any unemployment compensation?			1099-G
Did you receive any gambling winnings?			W-2G
Do you have any business income?			1099-NEC or financial documents
Do you have rental income property?			1099-MISC or financial documents
Did you receive your stimulus payments? a. If yes, did you receive both payments? b. If yes, how much did you receive?			
DEDUCTIONS			
Did you pay any out-of-pocket medical expenses?			Provide a summary of medical expenses paid
Did you have a Health Savings Account (HSA)? If yes, did you pay any medical expenses through this account?			1099-HSA
Did you make any cash contributions to a charitable organization?			Provide a summary of donations made. If a donation is over \$250, please bring in the letter from the organization
Did you pay property taxes?			Summer and Winter tax bills
Did you pay for vehicle license plates?			Provide amounts paid by vehicle
Did you pay any interest expense on your mortgage?			Mortgage interest statement
Did you refinance your mortgage in 2020?			Loan closing statement
Did you pay any student loan interest?			1098-E

OTHER ITEMS

Do you have any children in college?			1098-T
Did you participate in the Marketplace insurance program?			1095A
Do you have any interest in a foreign bank account?			
Have you purchased or used a digital currency during the year?			