

CHECKLIST

Please submit to us the following applicable 2020 documents. **We would appreciate if you could present these items to us in the following order as it will make the preparation more efficient and timelier:**

- Social security numbers for new dependents.
- All Local Tax Forms.
- W-2 Forms from all employers & last pay stub - for reference (returns cannot be prepared from pay stubs alone).
- 1099 Income Forms (Interest, Dividend, Retirement, Debt Cancellation, etc.) (including State/Local refund forms).
- 1099-Brokerage Statements reporting security sales & year-end/annual brokerage or investment statements.
Make sure cost basis is included. If you have a brokerage account, please contact your advisor, and ask if a corrected statement is forthcoming. This would avoid having to file an amended return where additional tax preparation fees would be incurred.
- 1095 A (when insurance obtained through the market place/"Obama Care") documenting health care coverage.
- Social Security benefits rec'd year-end statement(s) (**contact SSA 800-772-1213 for a duplicate copy if not rec'd**).
- Unemployment benefits received year-end statement(s) (**contact 888-313-7284 or unemployment online www.state.pa.us**).
- Schedule K-1 Forms, Federal & State(s), for interests in a Partnership, S Corporation, &/or Estate/Trusts.
- Farm income received this past year including from sales of livestock, crops, etc. & a summary of farm expenses.
- Alimony received or paid during 2020.
- 1099-G from Gambling winnings (including losses), all other misc. income.
- Please provide a **separate summary for each rental property** listing the income received and expenses paid for that individual property (we do not need receipts) for 2020.
- Settlement sheets for all properties purchased &/or sold during 2020.
- If you refinanced, please contact the lender to confirm if you paid points (amount paid & length of loan needed).
- 1099-Misc Forms and other related summary for income received but not reported on a 1099-Misc. Also, an expense summary related to this income (we do not need you to provide actual receipts).
- Summary of un-reimbursed business mileage & expenses.
- Real Estate taxes paid in 2020 (school, county, township) & Forms 1098 for all mortgage/equity loans.
- Sales tax paid in 2020 on any car, boat, or large item purchased.
- List of charitable contributions (cash & check). A letter is needed from any organization you donated > \$250.
- Non-cash contribution receipts—**summary of what, where, and when donated, estimated thrift shop value and approximate original cost.**
- Invoice for 2020 energy efficiencies for solar, wind and geothermal or fuel cell systems **ONLY**.
- Day care/summer camps for dependents under age 13: **provider name, address, EIN, or SSN and amount paid.**
- Health/dental insurance and all related out-of-pocket medical expenses. The medical deduction also includes tuition paid for a dependent to attend special schooling. Only medical expenses over 7.5% of income are deductible.
- PA Property tax/Rent Rebate. Qualified retirees should provide stamped real estate tax bills.

NEW CLIENTS ONLY

- 2019 Tax Returns (federal, state, and local).
- Copy of you and your spouse's (if applicable) driver's license.
- Copy of all Social Security cards.

As always, we appreciate your business! Stay safe and healthy.