

CHECKLIST TO HELP YOU ORGANIZE YOUR 2020 TAX INFORMATION

Some may apply to you, some may not.

1. Copies of all W-2(s), and 1099(s) reporting Wages, Gambling winnings, Interest, Dividends or Pension Distributions, 1099's for Unemployment Compensation, Social Security Benefits, Misc. Income
2. Covid-19 Stimulus Payment: Amount you received.
3. Brokerage Statements regarding the Sale of Stock, Original Cost and Purchase Date of Stock.
(PLEASE BE AWARE MANY STATEMENTS ARE ISSUED ONLINE ONLY)
4. Copies of K-1 forms from Investment in a Business Entity.
5. Names, Social Security Numbers and Dates of Births for all dependents. Any changes in 2020?
6. Real Estates Taxes, Town Vehicle Taxes and State Taxes paid, Sales Tax on Motor Vehicles (*For Mass residents age 65 or older who rent or pay real estate taxes bring tax bills and water & sewer bills*)
7. Mortgage Interest paid and any closing documents if you bought, sold or refinanced.
8. Medical Insurance, Prescriptions, Doctors, Dentists, Glasses and Medical Mileage. *Only if you itemize*
9. Charitable-Church, cash, noncash, etc. (*please bring receipts for all*) and Charitable Mileage
10. For **Business Use** of Vehicle: Mileage and Auto Expenses (*we need to know total miles, commuting miles, and business miles driven*). Please provide your mileage log. One is available on our website.
www.larsontaxservice.com
11. Name, address, Tax ID numbers, and amount paid to all Childcare Providers
12. Record of Estimated Tax Payments paid and date of payment.
13. Landlord's Name, Address and Rent Paid (*State of Mass residents only*).
14. Contributions to an IRA or a Roth IRA, 401K, 403B.
15. Theft or casualty loss information.
16. Documentation for Tuition and/or Student Loan Interest. (*Must have form 1098-T for deductions*)
17. Records of Rents Collected and Expenses Involved in Rental Activity.
18. Records of Income and Expenses from Self-employment Activity (Please provide a prepared Profit & Loss)
19. **IMPORTANT – ALL BUSINESSES** Copies of all 1099's you issued to others (Subcontractors, ETC.)
20. Records of any Alimony Paid or Received.
21. **FOR NEW CLIENTS** please bring a Copy of your 2019 Tax Return and a government issued I.D.
22. Information regarding health insurance coverage. **Proof of health insurance** (*Marketplace form 1095A if you acquired health insurance through the Marketplace*)