

Client Name: _____

2020 Tax Record Checklist - Wage Earner

Please bring the following items to your appointment:

- Please bring in a copy of your 2019 tax return and a photo ID if you are a new client.
- W-2 Forms. Bring final paystub too - it contains info not always on your W-2.
- 1099 Forms. (These could be 1099-R, 1099-MISC, 1099-S, 1099-Int)
- Certificate of Rent Paid if you rent your home.
- Property Tax Statement (most recent) if you own your home.
- Do you or your spouse have an IPIN? (IRS issued ID Theft Pin #)

- Has your marital status changed since 12/31/19?
- Are there **new dependents** in your household since 12/31/19?*
- Have you received any correspondence re your 2019 taxes?
- Do you need advice on any special issues now or in 2021?
- Do you have a bank (checking or savings account)?
- Did you sell a home in 2020?
- Are you still waiting for certain tax documents to come?
- Have you filed for bankruptcy or had debt cancelled in 2020?
- Do you have health insurance?
- Did you receive any nontaxable income?
- VA Benefits MFIP Work Comp < Check all that apply.

	YES	NO

* Bring a social security card and birth certificate for any NEW dependents on your return.
 New clients should bring both (SS card and birth Cert) for all children on the EIC form)

Contact Info :

Taxpayer:	DOB	SSN
Spouse:	DOB	SSN

Address: _____

New Dependents:

Name	SSN	DOB

Home Telephone: _____

Cell Phone: _____

Email: _____

State Income Tax -Did you live or work in another state other than your home state? Y ___ N ___

Dates of Residence:	ST # 1		ST #2	
Spouse Date if diff:	ST # 1		ST #2	

Delivery Preference: Sitdown ___ Online ___ US Mail ___ Pickup at Front Desk ___ Pickup out front in car ___

Miller Block Building

165 5th St SE

Pine City, MN 55063

Tel (320) 629-4745

Fax (516) 941-0225

email todd@toddstaxservice.com

Cell (612) 242-5713 texts ok.

Do you have?
Roth IRA

529 Plan Educa

401K or other retire pl

HSA

Credit card debt?

INCOME CHECKLIST

	Wages	W-2
	Unemployment	1099-G
	Interest	1099-INT
	Gambling	W-2G
	Self Employment	1099-MISC
	IRA/ 401K Distribution	1099-R
	Other - please specify:	
	Foreign Accounts?	
	Open IRS Issues?	
	HSA Distribution (Form 1099SA)	
	Form 1095-A from Health Exchange	
	Forms 1095 -A,B or C (Health)	

How much was your stimulus payment? _____

DEDUCTION /CREDIT CHECKLIST

Check all that apply - include documents or show on reverse side of checklist.

	Medical Bills - see reverse	
	Mortgage Interest	
	Property Taxes	
	Contributions	
	Work Related Expenses	No longer deductible
	Tuition	
	Casualty/Theft Loss	
	Daycare expenses	
	Student Loan Interest	
	Auto Tax (Tabs)	
	State:	
	Minnesota K-12 School	
	Wisconsin Rent/Prop Tax Paid	
	WI Rent - Heat Paid?	Y ___ N ___

