

Income Tax Information for Your Preparer

Please provide copies (not originals) of all forms. Digital is preferred.

Your basic info: Name, address, phone numbers, email addresses, SSNs, birthdates. If I have prepared your returns in earlier years and this info has not changed, **please make a statement to that effect.**

Please also confirm your bank routing and account numbers.

Income

1. Wages/Salaries/W-2 forms
2. 1099 – MISC forms for prize winnings, gambling, etc.
3. 1099-R forms for distributions from pensions, IRAs, etc.
4. Schedule K forms for partnerships, estates, trusts, etc.
5. Other income (explain)
6. If you receive child support, veterans benefits, workmen's compensation, or alimony, please list it.
7. SSA-1099 form for Social Security income
8. 1099-INT for interest income
9. If you sold or bought a new house last year, please include the closing papers for each transaction.
10. If you received government stimulus payments in 2020, please list the amount.

Expenses/Deductions – look to see if you have been able to itemize deductions in the past. If you haven't, you might not want to spend a lot of time listing noncash donations. Cash contributions up to \$300 are deductible separately for 2020.

1. Charitable contributions – cash: please include a list of monetary contributions. **Do not give me your receipts**
2. Charitable contributions – noncash: please provide a list that includes the name of the organization, the items donated, the date of donation, and the value.
3. Volunteer Work – mileage: if you had mileage please list it, along with the name of the organization you worked for.
4. Retirement contributions – please list any contributions to retirement accounts that are not already listed on your W-2 forms

If I did not prepare your 2019 returns, please provide me with a copy, which I will return to you.

If You Are Self Employed

Please provide the following:

1. 1099-MISC forms for any work you performed
2. All other income you earned doing this work, whether you received a 1099 or not (it still counts!)
3. A list of any equipment you purchased to do your work with this information: cost, date of purchase, date you started using equipment
4. Do you have a space in your home dedicated to this work? If so, you have a home office, so please provide this information:
 - Square footage of your office
 - Square footage of your entire home (if your basement is unfinished, do not include it in sf calculation)
 - Total utility costs for 2020, including water, electricity, natural gas, internet, cell phone service or additional phone line
 - Cost of homeowners insurance
 - Annual property tax
 - Any 2020 repairs to your home and the cost
5. Any other expenses you incurred: supplies, postage, business licenses and fees, advertising, software, et cetera. If you are unsure of whether something is deductible, list it, and we can figure it out.
6. Do you use a vehicle for this work? If so, please provide this information:
 - Make and model of the vehicle
 - Date you started using it for business
 - Business miles AND total miles for 2020

I will also calculate the amount you are qualified to put into a SEP IRA (IRA for self employed people). You don't have to put the full amount in, but it's always helpful to sock something away.

If You Own Rental Property

Please provide the following:

1. Date you purchased property, purchase price, description of property
2. Date you started renting property
3. Rental income in 2020, whether it was on a 1099 or not, and how many days it was leased.
4. All expenses incurred for property:
 - Repairs
 - Maintenance
 - Management fees
 - Supplies
 - Property tax
 - Homeowners insurance
5. If you have a mortgage on the property, please provide a copy of the 1098 form from the lender
6. Did you use a vehicle to help manage this property? If so, please provide the following:
 - Make and model of vehicle
 - Date you starting using it for rental property
 - Rental miles **AND** total miles in 2020

If You Have a College Student Dependent

Please provide the following:

1. Form 1098-T from college or university
2. All expenses for your student: rent, supplies, books, parking, lab fees, tutoring, uniforms

If You Paid for Child or Dependent Care So You Could Work or Look for Work

Please provide the following:

1. Name, address, phone number, and tax id number of each provider,
2. Amount paid to each provider
3. Name of child receiving care from each provider

If You Have Dividend Income or Bought or Sold Investments in 2020

Please provide the following:

1. The entire statement from the investment company. The pages usually say “2 of 15” or something like that. I need all 15, even if you think I don’t.
2. If they are investments you inherited, please provide the date of death of the person from whom you inherited.
3. If, after you have sent the statement to me, you receive an amended statement, please send that entire statement too.