

To set an appointment please email: CPA@UnderstandYourTaxes.com

2020 Tax Return Information

Name _____ SS# _____ DOB _____
Spouse _____ SS# _____ DOB _____
Dependent _____ SS# _____ DOB _____
Dependent _____ SS# _____ DOB _____
Dependent _____ SS# _____ DOB _____
Address _____ City _____ Zip code _____
Phone: _____ Email: _____
Your Occupation: _____ Spouse's: _____

*****Amount of stimulus check received in 2020 \$*****

Documents needed to be sent to the CPA:

- W2's or 1099's** - Received from employers
- 1099-DIV or INT** - Bank & Investment statements **received Jan 2021**
- Form-1099-B** - Stock and mutual fund sales
- Form 1098** - Mortgage interest statement
- Form 1099-SA** IF you used HSA account for medical in 2020
- Form 1098-T** College tuition fees statement
- 1095-A ONLY** IF you had insurance through Healthcare Marketplace
- Closing statements if you **sold** your home in 2020

Special notes/questions for me this year:

1. If you want refund quickly direct-deposited:

Routing #: _____ Acct #: _____

I. INCOME:

2. Contractor Income / Side-work (**NOT your w2**) – Ask Ken for “Business Checklist”
3. Rental income – Ask Ken for “Rental Checklist”
4. Did you take any money **out of** an IRA or 401K in 2020? SEND ME THE 1099-R
5. Did you **acquire or sell** any virtual currency in 2020? YES/NO

II. DEDUCTIONS/TAX CREDITS:

6. Medical expenses **ONLY if more than 7.5% of your income** \$ _____
7. Amounts paid for county taxes paid for **house** \$ _____ & all **vehicles** \$ _____
8. Charitable deductions Cash \$ _____ and Goods \$ _____
9. Traditional **IRA** contributions: \$ _____ **Do not include ROTH IRA/401k**
10. Daycare: Amount paid: \$ _____ Facility's Federal Tax ID # _____
Facility Name and FULL Address: _____
Did you use Flexible Spending Account to pay for any of this? Circle YES or NO

REMEMBER: I pay you \$20 for each new client you refer! Thank you!!