2020 CLIENT TAX PREPARATION CHECKLIST

(WHAT YOU SHOULD BRING TO YOUR TAX APPOINTMENT IF APPLICABLE)

- **INCOME**
  - W-2s
  - 1099s
  - Pensions, Annuities, Profit Share, IRAs, etc.
  - Social Security Benefits
  - Interest/Dividend Income
  - K-1s (when applicable)
  - Investments Sold
  - Virtual Currency (Bitcoin, LiteCoin, Etc.)
  - Other Income
- **ITEMIZED DEDUCTIONS**
  - Medical/Dental/Vision Expenses
    - Co-Pays, After-Tax Insurance Premiums, Lab Fees
    - Prescription Drugs
  - Taxes Paid
    - Real Estate
    - Sales Tax (New Vehicle Purchase)
    - Vehicle License Tax (Registration)
  - Interest Expense
    - Mortgage, Current Residence, Second Home, (RV/Boat may be considered second home if qualified)
    - Mortgage Insurance Premium
  - Charitable Contributions
    - Cash – Contributions made by check, cash or credit card
    - Non-Cash – Items donated to Goodwill, Savers or other nonprofit organizations (must be a 501c3 organization)
      - NOTE: Please value these items before you come in, use the link below for a valuation guide
      - GOODWILL: https://www.goodwillaz.org/estimated-donation-values/

Please bring in ALL of your contribution receipts; they may qualify for a tax credit with the State of Arizona

    - Miscellaneous
        - Gambling Losses (to the extent of gambling income)

- **DAY & CHILDCARE EXTPENSES**
    - Please provide:
        - Facility Name or Individuals Name
        - Facility's Address or Individual's Address
        - Facility's EIN# or SSN
        - The amount(s) you paid for the year
            - If there is more than one child, please break up totals.

- **ESTIMATED TAX PAYMENTS**
    - Federal Payments
    - Statement Payments

    *Please provide date & amount of each payment

- **SELF EMPLOYMENT/BUSINESS INFORMATION (SCHEDULE C)**
    - Total Income
    - Total Expenses, Identified/Listed
    - Assets Purchased
    - Cost of Goods Sold
        - Inventory
        - Purchase
        - Materials Supplies

- **RENTALS**
    - Address Of Each Rental
    - Income Per Rental
    - Expenses Per Rental