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## IT'S 2020 TAX TIME!!!!!!

What you need to file your taxes varies depending on your situation. Below is a helpful checklist to find the tax documents and forms you will need to properly prepare your 2020 tax return.

### **REQUIRED - WHAT TO BRING**

- ALL TAXPAYERS:** An unexpired government issued photo ID, driver's license or passport and social security card or Tax ID (ITIN Letter).
- FOR ALL DEPENDENTS:** Date of birth (birth certificate(s) for minors), social security card or tax ID (ITIN Letter).  
**Required for Minors:** Proof that minor has been living with you such as a school report card, official school letter, doctor letter, custody document, rental lease.
- HEALTH INSURANCE:** Form 1095-A if you enrolled in an insurance plan through Marketplace (Exchange).
- STIMULUS PAYMENT:** Record showing your stimulus payment (EIP) received, if applicable.
- ALL INCOME STATEMENTS:** Form W-2 (employment), Form 1099-G (unemployment), 1099-MISC or 1099-NEC (self-employment), Form W-2-G (gambling winnings) including loss report, Form 1099-R (pension/retirement), Form 1099-DIV (dividend), Form 1099-INT (interest), Form SSA-1099 (social security), Form 1099-B (stock sales), Form 1099-SA (health savings account), transactions involving cryptocurrency (virtual currency), and any other document(s) showing taxes withheld. Income of dependents and of other adults in your home.
- SELF-EMPLOYED OR IF YOU OWN A BUSINESS:** Form 1099-MISC or 1099-NEC, Schedule K-1, business income records to verify amounts not reported on 1099-MISC or 1099-NEC, business registration documents.  
**Expenses:** Records or reports of all expenses including bank or credit card statements, receipts, check registers and mileage log. Business use asset information (cost, date placed in service, etc.).  
**Tax Payments:** Records of estimated tax payments made.  
**Rental Income:** Records of income and expenses paid. Rental asset information (cost, date placed in service, etc.).
- COLLEGE STUDENTS:** Tuition Form 1098-T **including** proof of payments and expenses paid. Form 1098-E if you paid student loan interest.
- EDUCATOR EXPENSE:** Receipts for classroom expenses (for educators in grades K-12).
- IF ITEMIZING DEDUCTIONS:** Provide expense records such as - Form 1098 (mortgage interest form), real estate and personal property tax payment, medical or insurance payment receipts, charitable contribution document (church/organization letter or donation document).
- CHILDCARE EXPENSE:** Document from childcare provider including business name, address, social security/ITIN or EIN number, and amount paid for year.
- FOR DIRECT DEPOSIT:** Bank routing and account numbers to receive your refund by direct deposit or pay your balance due, if you choose.
- IDENTITY PROTECTION PIN:** If one has been issued to you, your spouse, or your dependent by the IRS.
- FOR NEW CLIENTS:** Bring your prior year tax return (not mandatory).
- OTHER:** Any other pertinent tax documents that you are not sure of.

**\*\*\*\*\*WE ARE HERE TO HELP YOU DETERMINE WHAT DOCUMENTS YOU NEED TO FILE YOUR TAXES. PLEASE FEEL FREE TO CALL US FOR A FREE CONSULTATION\*\*\*\*\***