

# FOULK HUBER PA

## 2020 TAX RETURN CHECKLIST

### INCOME

- \_\_\_\_\_ Form W-2 – Wages
- \_\_\_\_\_ Form 1099 - Interest and Dividends
- \_\_\_\_\_ Form SSA-1099 - Social Security benefits
- \_\_\_\_\_ Form 1099R - Pensions, IRAs and Annuities
- \_\_\_\_\_ Form 1099B - Sale of stocks and bonds
- \_\_\_\_\_ Form 1099-NEC – Self-employment income
- \_\_\_\_\_ Form W-2G – Gambling Winnings
- \_\_\_\_\_ Form 1099-G – Unemployment Benefits (**NJ will email to you if your email is on file**)
- \_\_\_\_\_ Schedule K-1- Partnerships, LLCs, S Corporations and Trusts
- \_\_\_\_\_ Rental properties - Rent received and expenses paid by property. For vacation homes, provide number of days rented and used personally.
- \_\_\_\_\_ Schedule C - Business income – Total income received and detail of expenses paid. **Business mileage for 2020 was \$.575 per mile.**
- \_\_\_\_\_ Alimony received.

### ADJUSTMENTS TO INCOME

- \_\_\_\_\_ Contributions to IRA, traditional or Roth
- \_\_\_\_\_ Form 1098-E - Student loan interest paid (access on-line)
- \_\_\_\_\_ Alimony paid.
- \_\_\_\_\_ Teacher classroom expenses
- \_\_\_\_\_ Form 1099SA & 5498SA - Health Savings Account info

### ITEMIZED DEDUCTIONS/CREDITS

- \_\_\_\_\_ Medical expenses (summary of expenses only) **Medical mileage for 2020 was \$.17 per mile.**
- \_\_\_\_\_ Real estate Taxes
- \_\_\_\_\_ Quarterly estimated state and local income taxes payments, including dates paid
- \_\_\_\_\_ Mortgage Interest paid; Form 1098
- \_\_\_\_\_ Charitable Contributions (summary only of both cash and non-cash donations) **Mileage for charitable work in 2020 remained unchanged at \$.14 per mile.**
- \_\_\_\_\_ Child care expenses, including the name, address and tax ID# for the provider.
- \_\_\_\_\_ Education Credits - tuition, and other expenses paid for you and your dependents. Include Form 1098-T Tuition Statement from the college or university.
- \_\_\_\_\_ **Stimulus Checks – Provide the amount(s) of any stimulus money you received. The IRS sent out Notice 1444 and 1444-B with the exact amount received or verify the amount via your bank account.**

### MISCELLANEOUS

- \_\_\_\_\_ For NJ residents only, proof of health insurance coverage, if not provided by employer or Social Security, Include Forms 1095-A, B or C.