ERBFINANCIAL

WE MAKE FILING LESS TAXING

☑ Tax Preparation Checklist - 2020 Tax Year

(what you should bring in or send us)

- ☐ 1. Copy of both sides of your Driver's license or State ID (unless we already have your current, valid ID on file. Joint filers need both IDs.)
- ☐ 2. Wage Statements (W-2) and 1099 Forms
- ☐ 3. Pension, IRA, or Annuity Statements (1099-R)
- ☐ 4. Social Security Income Statements (SSA-1099)
- ☐ 5. Interest & Dividend Income Statements (1099-INT & 1099-DIV)
- ☐ 6. Unemployment Income Statements. In NY State, get NY Form 1099-G online at https://www.tax.ny.gov/pit/file/1099g.htm or call 888-209-8124.
- ☐ 7. Total $ amount of Stimulus Payment(s) received through January 15, 2021
- ☐ 8. Charitable Donations paid by check, even if not itemizing
- ☐ 9. Consolidated tax statements of investment income, sales, and purchases
- ☐ 10. Student Loan Interest paid
- ☐ 11. Education Expense Information (1098-T, and detail of expenses paid in - Call us.)
- ☐ 12. Individual Retirement Account (IRA) contributions
- ☐ 13. Dependent Care expenses: Amount paid for each child; Providers Name, address, Federal ID number, and amount paid to each provider
- ☐ 14. Record(s) of Estimated Tax Payments made (Federal and State), including dates paid
- ☐ 15. If you Itemize: Property Taxes, Mortgage Interest, Charitable Contributions, Medical Expenses if over 7.5% of Adjusted Gross Income
- ☐ 16. Energy related expenses: New furnace, windows, doors, insulation, solar
- ☐ 17. Major changes from last year. If new to Erb Financial, a copy of last year's return
- ☐ 18. Any other income, deductions, questions, or information you think might impact your tax return (Space for notes below).
- ☐ 19. Current Phone number: ______________________________ Best time to call: ____________
- ☐ 20. E-mail: ____

We will call you to discuss your tax information before completing your returns. At that time we can review your situation to make sure we have all of the necessary information to properly complete your tax forms.

Notes:

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