Pettigrew & Pettigrew, CPAs
Tax Return Checklist

***** We offer tailored tax organizers for our clients. If you would like for us to mail or email you a tailored tax organizer, please call 478-453-9305 or email custserv@pettigrewaccounting.com to make that request.***

INCOME

Below is a list of forms that will be required if applicable

Active income

_____ W-2s (wages)
_____ Business income (also see Business Organizer)*
_____ Rental income (also see Rental Organizer)*
_____ Farm Income (also see Farm Organizer)*
*Please also bring all 1099-Misc or K-1 forms received
*Business, Rental, and Farm Organizers can be found at www.pettigrewaccounting.com

Retirement Income

_____ 1099-R (pension, annuity and IRA income)
_____ 1099-SSA (social security income)

Investment Income

_____ 1099-DIV (dividends from stocks owned)*
_____ 1099-INT (interest earned from banks and bonds)*
_____ 1099-B (sale of stocks and bonds)*
_____ 1099-Consolidated (from financial advisor - This should include stock sales, etc)
*1099 B, INT and DIV may be included with the 1099-Consolidated info
_____ 1099-S (sale of real estate or timber) Bring Closing Statements for real estate sales

Other Income

_____ 1099-G (Prior year state refund and/or Unemployment benefits)
_____ W-2 G – Gambling Income
_____ Alimony received
_____ Other income for which a tax form such as 1099 or W-2 was not received

ADJUSTMENTS

_____ IRA Contributions $____________
- Please indicate Traditional IRA or ROTH IRA

_____ Student Loan interest paid
_____ Alimony Paid - Please provide recipient's SSN_______________
_____ Health Savings Account (HSA) Contribution $_______________
- Please provide copy of 1099-SA

HEALTH INSURANCE

_____ 1095-A - For those with health insurance purchased over the health insurance exchange (healthcare.gov) ****The IRS will not process returns that omit this information***
_____ 1095-B/C - For those with employer or retirement sponsored health insurance

DEDUCTIONS

Medical Expenses

- $_________ Health Insurance paid outside of a pre-tax program
- $_________ Doctors Bills (out of pocket)
- $_________ Dentist Bills (out of pocket)
- $_________ Prescriptions / Pharmacy (Prescribed drugs only - out of pocket)
- $_________ Eye Care
- $_________ Long Term Care Insurance (Please separate by spouse)
- $_________ Lodging while on medical related travel for yourself or a dependent
- __________ Miles driven for medical trips
- $_________ Other Medical such as medical equipment, chiropractic, hearing aids, etc.

Taxes Paid

- $_________ Property Taxes
- $_________ Vehicle Tags and taxes
- $_________ Title Ad Valorem (TAV) tax on purchase of new vehicles

Mortgage interest

- ______ 1098 - Mortgage interest paid
- ______ Closing Statements if you purchased or refinanced your home in the previous year

Charity **(Note: New to 2020, $300 of charitable donations are allowable for standard deduction filers)**

- ______ Statements from Churches and Charities for cash and check donations
- ______ Statements for Non-Cash Donations to charities such as Salvation Army, etc.
  - *If total Non-Cash Donations exceed $5,000 please bring certified appraisal
- _______ GOAL Scholarship (form IT-QEE-SSO1 required)
- _______ HEART Rural Hospital (form IT-QRHOE-RHO1 required)
- ______ Volunteer Miles driven

CREDITS

_____ 1099-T - College / Technical School credit for yourself, spouse, or dependent

$_________ Cost of Books and required classroom supplies for Higher education

_____ Child care Credit - cost for child care / preschool for children under age 13

- Provider name _______________________
- Provider Address _____________________________
- Amount paid to provider $________________________

PAYMENTS

Please provide us with the amounts of Quarterly Estimated taxes paid in for the prior year

	Federal	State	Date paid	Check number
1st Q due 4/15/20	_________	_________	_________	__________
2nd Q due 6/15/20	_________	_________	_________	__________
3rd Q due 9/15/20	_________	_________	_________	__________
4th Q due 1/15/21	_________	_________	_________	__________

Please let us know if you received the 1st or 2nd Stimulus payment and how much. This is not taxable income, but we would like to make sure to get this for you on your 2020 tax return if you did not receive these already.