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 custsery@pettigrewaccounting.com to make that request.

<u>INCOME</u>						
	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 Inc	come					
	1099-R (pension, annuity and IRA income)					
	1099-SSA (social security income)					
Investment Inc	coma					
mvesiment mo	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					
<u>ADJUSTMEN</u>	<u>NTS</u>					
	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					
<u>HEALTH IN</u>	<u>SURANCE</u>					
	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

\$ 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	Medical Expenses								
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• • • • • • • • • • • • • • • • • • •	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.