Premier
CPA SERVICES PC

# 2020 Personal Tax Preparation Checklist*

- ☐ Changes to name/address/email/phone.
- ☐ Changes to bank account information (for possible refunds).
- ☐ Changes to filing status or dependents (date of birth and Social Security card, if new).
- ☐ All income forms (W-2, 1099, 1099-G for state unemployment benefits, IRS Notice 1444 for CARES act stimulus payments or proof of both 2020 and January 2021 payments), plus alimony, pensions, Social Security, gambling, etc.
- ☐ Income of any children/dependents in the home.
- ☐ Payments/deductions for student loan interest, qualified college expenses, state & local taxes, HSA and IRA contributions, etc.
- ☐ Health insurance form 1095-A if using healthcare.gov.; amount of premiums paid from any other source.
- ☐ Estimated tax payment records (forms 1040-ES, 500-ES) with proof of payment.
- ☐ 2020 annual statements from all retirement accounts, brokerage accounts, annuities, etc.
- ☐ Receipts for cash charitable contributions (even if you do not itemize, there is a $300 deduction available).
- ☐ IRA withdrawals/proof of rollovers to a new account or Roth IRA, if used for qualified charitable donations, or return of RMD due to CARES act changes.
- ☐ For IRA withdrawals before age 59½, choice of election to pay tax on the withdrawal over a period of 1 or 3 years. Was the withdrawal due to COVID-19 illness or hardship, or a birth or adoption? Do you plan to put the funds back within 3 years?
- ☐ Sales or purchases of real estate (closing documents on purchase or sale, plus receipts for any upgrades; if primary home for at least 2 years, only need closing documents on sale).
- ☐ Receipts for residential energy upgrades to primary or secondary home, including any solar equipment put into place in 2020.

**This list not inclusive. If you have any questions, please contact us.*

**706-632-7850 | 152 Orvin Lance Drive Suite B | Blue Ridge, GA 30513 | PremierCPAServices.com**