

PERSONAL FILING CHECKLIST

INCOME:

- W2, 1099NEC, 1099MISCO (see business deduction sheet)
- Retirement, rollover, early withdrawal for a 401K (1099R)
- Interest/dividends (1099INT/1099DIV/1099OID)
- Stock exchanges (1099B & Cost Bases), sale of property (1099S)
- Social Security statement (1099SA), Railroad (RRB 1099)
- Unemployment statement (1099-G)
- K-1
- Health/Medical savings account (1099TLC)
- Transaction with virtual currency
- Alimony received (prior to 2018)

DEDUCTION INFORMATION:

- Mortgage interest (1098) & property tax (include the PIN#)
- Any other 1098 showing interest paid (time share, second home etc.)
- Sales tax on vehicles purchased in 2020
- Charitable contributions
- Paid medical expenses. (see info. below)
- Health/Medical savings account contribution
- Student loan interest paid (1098-E)
- Educator Expense deduction
- Tuition and fees (job related or non-college course)
- Contribution to a Traditional IRA
- Alimony Paid (divorce prior to 2018)

CREDITS:

- Childcare Expense Credit: Name, address, SSN/EIN, amount paid.
- Energy saving home improvement credit (see list below)
- Educational credit (1098-T)

ADDITIONAL DOCUMENTS:

- Marketplace ACA (1095-A)

- Tuition, book fees, lab fee, etc. for children K-12 grade. This is for a state deduction only

TAXES PAID:

- Estimated federal taxes paid in 2020
- Estimated state taxes paid in 2020

FEMA PAYMENTS TO YOU.

Did you/ family receive your 2020 1st stimulus payment?

To see a list of medical deductions, see publication 502

Home Improvements that Qualify for the Credit

Here are the various energy-efficient products which qualify for the credit and the maximum amount that can be claimed for each:

- \$300 for biomass stoves
- \$50 for advanced main air circulating fans
- \$300 for air source heat pumps
- \$300 for central air conditioning
- \$150 for gas, propane, or oil hot-water boilers
- \$150 for gas, propane, or oil furnaces
- \$300 for gas, propane, oil, or electric heat pump water-heaters
- \$500 for energy-efficient doors (installation costs do not count)
- \$500 for energy-efficient skylights (installation costs do not count)
- \$200 for energy-efficient windows (installation costs do not count)
- \$500 for insulation (installation costs do not count)
- \$500 for metal or asphalt roofing (installation costs do not count)

Remember that only \$500 of all combined qualified costs may be credited.