



2020 Personal Tax Checklist

This check list is provided to help you gather necessary information for us to prepare your 2020 income tax return. Return this list, along with the supporting documentation, to our office and let us know of any significant changes from your 2019 tax year.

Economic Impact Payment

☐ Notice 1444

State and city refunds and other government payments (Form 1099-G)

☐ Unemployment compensation

Other Income (provide supporting documentation for income received for the following items)

☐ Sale of assets or property

☐ Cancellation of debt

☐ Other income _____

Payments (provide supporting documentation for payments made for the following items)

☐ Educator classroom expenses

☐ Employee business expenses

☐ Contributions to a Health Savings Account

☐ Expenses related to work relocation

☐ Alimony

☐ Student loan interest

☐ Tuition and fees for higher education

☐ Expenses related to child or dependent care

☐ Contributions to a Retirement Savings Account

☐ Medical and dental expenses

☐ Real estate taxes

☐ Other state and local taxes

☐ Mortgage interest

☐ Investment interest

☐ Cash Contributions

☐ Noncash Contributions

☐ Unreimbursed employee expenses

☐ Investment expenses

☐ Gambling losses

☐ Other payments _____