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**Tax return checklist - 2020**

**Please don’t forget – we’ve moved! We’re now located at:**

**607 Cheek Sparger Road, Suite 150**

**Colleyville, TX 76034**

**817-503-0336**

**Connie Ogden, CPA 817-723-6079**

Here’s what we need to prepare your taxes. Not all these documents will

apply to your situation. Please provide these if they do!

**Employment and income records**

* W-2 forms for each employer. If a W-2 isn’t available, then please bring last pay stub.
* Pension and annuity statements
* Alimony received
* Partnership and trust income
* Scholarship and fellowship awards
* Social security statement

**Self-employment records**

* K-1 forms on all partnerships
* Receipts and documentation for business-related expenses
* 1099-MISC and 1099-NEC
* Mileage log

**Homeowner records**

* Form 1098 for mortgage interest
* Form 1099-S if you’ve sold your home or other real estate, or HUD-1, if applicable.
* Second mortgage interest
* Real estate taxes
* Moving expenses

**Financial assets**

* Interest income statements
* Dividend income statements
* Broker transaction proceeds
* Unemployment compensation
* Retirement plan distributions

**Financial liabilities and expenses**

* Student loan interest
* Medical savings accounts, including HSA
* Charitable donations
* Adoption expenses
* Alimony paid
* Childcare expenses, and name, address and SSN or EIN of provider(s)
* Education expenses and form 1098T (tuition statement)
* Investment expenses
* Info on any Cryptocurrency transactions

**Other documentation**

* IRA, Keogh, SEP and other retirement plan contributions
* Income from other sources, such as real estate, rentals, etc.
* Prior year’s tax return, unless we did your return last year