

Please BRING this paper with you to your appointment



8903 W. Sunset
Wonder Lake, IL 60097
(815) 728-1996

INCOME & Expenses:

If you do not understand or are not sure if something applies to you, PLEASE bring this with you and we will review this together. ☺ Pixie

THIS YEAR IRS required documents for when dependent children are on tax return!!

1. Social Security Card, Birth Certificate, Driver's License (if driving). (If already on file with us, omit)
2. If under 18 documentation from School showing residence and residential parents: school registration for online classes is acceptable for Spring and Fall 2020. Home school registration is acceptable.
3. If Pre-School Age, then day care document, doctors bills showing custodial parent address and child's address is the same or any document showing they were home with you as you worked from home (If possible).
4. If dependent is 19 – 24 years and full-time student: for Education Credit MUST have Form 1098-T and account transcript from college showing *entire account of charges and payments with DATES*. (Remember include Book Receipts for deduction.) Also Scholarship information.
5. If you are Head of Household must bring documents to prove you supported children and children are with you. (Utility bills, Lease with children's names, etc.) PLEASE CALL FOR MORE INFORMATION.

NEW DOCUMENTS:

1. **TEACHERS bring expenses!! Your deduction is permanent. Also expenses for COVID Safety! NEW**
2. **MUST BRING proof of Economic Stimulus/Recovery Payment Amounts:** Notice 1444 letters, bank statement showing amount received. IRS may set up a way to get online – we will help you get information when they do.
3. **Bring Charity document showing Cash or Check Only contribution of at least \$300 for NEW Standard Deduction.**

Forms and Documents

- W-2 ____; 1099-R ____ (if Rollover, bring proof of Rollover; *Also bring end of year statements for all Retirement Accounts*); SSA-1099(Social Security) ____; RRB-1099 or Other Retirement Annuity ____
- Medical Coverage: Form 1095-A ONLY; Also Form 1099-SA (HSA Medical) & Form 5498-SA (HSA, MSA)
- W-2G__(Gambling: bring proof of losses per type of bet per day); 1099-G (Unemployment Income Statement ____ & 1099-G State Tax Refund (from all years if proceeds received____ 1099-INT ____ 1099-DIV ____); Municipal Bond Interest ____; ***Bring ALL documents from Broker end of year and tax statement***; 1099-B & sales of stocks, bonds____(number of statements attached); Attach all stock sale transaction information. 1099-S (real estate sale) attach all escrow statements & initial costs)_____
- Forms 1099-Misc. _____(number of forms); Forms 1099-NEC ____ 1099-K ____ 1099-A (abandonment/foreclosure) & ALL 1099-C____
- Schedule K—1 _____ (Partnerships, S-Corporations, Trust or Estate Income)

- **ALL information about any funds or ownership you have in any Foreign Account.**
- Alimony Received ____ Or Alimony Paid ____ to (Name of receiver of alimony)_____& (Social Security Number AND copy of divorce decree.)- Unless we already have on file.
- Form 1099-Q
- Jury Duty _____; Unreported Tips _____; Disability Income ____; Any other Income from Bartering or Hobby _____; Elections Worker _____
- For seller financed mortgage include amount of Buyer paid interest to you and their Social Security Number and address: \$ _____ Buyer info _____

- **BRING **Settlement Statements**____; (if Sold or Bought or Refinanced in 2019 bring Settlement Statement)
- **ILLINOIS K-12** bring registration sheets showing costs for Private or Public schools all fees paid for tuition, lab fees, Driver’s Ed, book fees, book rental and any field trip receipts,. (Homeschoolers bring actual receipts)
- Donation information to any Illinois College Savings Plans

Retirement Contributions

- IRA Contributions for 2020:** _____
- ROTH Contributions for 2020** _____
- **SEP, Keogh, Individual 401(k) or SIMPLE contributions** _____
- Do you want to make a contribution in 2021 for 2020 prior to April 2021? ___
- If Form 1099-Misc is for BUSINESS, Rental, or Farm then attach the 1099-Misc to an “Income and Expenses” document for that Business, Rental, &/or Farm. ****See website www.abptaxservices.com for helpful sheet to organize this information. For more detailed help go to “Client Resources to Log-in and have access to Specialized Worksheet to detail Income and Expenses.
- Business, Rental, Farms: Include a list of all new equipment acquired this year, including date of purchase and cost.