PS It’s Tax Time

3600 Velp Ave Suite 4B

Green Bay, WI 54313

920-434-5211

2020 Drop off information

Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Phone \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Spouse \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Phone \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Driver’s license** number, issue date and expiration date for both of you.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Did you move? **New address** please! \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Did you have any **children in 2020**? Need name, date of birth and ss # \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Bank Information if you **changed banks**: Routing number \_\_\_\_\_\_\_\_\_\_\_\_\_\_Acct #\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Did you have **unemployment?** Yes/ No If yes print your 1099G from the website.(IS NOT IN US MAIL)

Did you have **Obamacare** insurance (Marketplace/Common ground? If yes need **1095A**

If you have a **HSA** (Health savings account) need the distribution amount for 2020. Either get that online at the bank that has the account or they may have mailed a form. The contribution is on your W2

**Cost for health insurance** if not directly from employer. **Mostly this will be retired people**. The cost of your Medicare is on the SSA form but I need additional paid for Part B, dental and vision. This is a deduction on the Wisconsin return. Total paid out of pocket, not on SSA \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Did you **contribute to a ROTH IRA or TRADITIONAL IRA** need the $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Did you **sell a house**? Need new address and closing document for both.

Did you **take money** out of any IRA/investments/stocks? Yes- Need 1099 for each.

Any home **energy improvements**: new windows/doors/air conditioning/furnace? If yes need the amount spent and need to know if you have ever used the deduction for that in the past. It is a $500 lifetime credit so you would need to know from 2008 until current if you used it on taxes. If you have been with me I can check on the years I did.

Children in **daycare**? Provider’s name, address, tax ID and the amount paid for 2020.

Children in **college**? Need 1098T and expenses that were paid by you or the student if you are claiming them. If they are under 24 and still supported by you it is usually better for you to claim them.(even though they don’t get the stimulus.) We may want to discuss that before filing.

Primary residence **property tax** bill, indicating amount paid in 2020. I can look that up for you if needed.

**Rent paid** for 2020 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Heat** included **Y or N**

**Charitable** donations made by check or credit card that can be proved up to $300. Yes or No please indicate the name of the charity. Non cash donations are not allowed for this deduction. It is up to the taxpayer to have the necessary document to prove this donation.

**Student loan interest** amount paid in 2020. \_\_\_\_\_\_\_\_

Please include all income sources: W2, Social Security SSA1099, 1099INT, 1099R, 1099Misc, Gambling winnings(W2G), cancellation of debt(1099C), alimony and all other incomes.

Did you receive the **stimulus**? First round amount \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Second round amount \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_