MUELLER•PYE
& Associates CPA

2020 INDIVIDUAL TAX CHECKLIST

We are ready to start preparing your 2020 tax returns!

Below is a list of items we will need to prepare your individual income tax return. Please securely upload the documents using ShareFile (call Connie or email her at connie@mpa.cpa for the link):

Traditional Items:

- ☐ **Forms W-2, Wage and Tax Statement**
- ☐ **Forms 1099-MISC, Miscellaneous Income**
- ☐ **Forms 1099 for all bank and investment accounts (1099-INT, 1099-DIV, 1099-B)**
- ☐ **Forms 1099-R, Distributions from Pensions, Annuities, Retirement**
- ☐ **Forms 1099-G, Certain Government Payments (including unemployment benefits and state income tax refunds)**
- ☐ **Forms 1099-SA, Distributions from a HSA**
- ☐ **Forms SSA-1099, Social Security Benefits**
- ☐ **Schedules K1, Partner/Shareholder Share of Income, Deductions**
- ☐ **Form 1095-A, Health Insurance Marketplace Statement**
- ☐ **Form 1098, Mortgage Interest Statement**
- ☐ **Property Taxes**
- ☐ **Charitable Contributions**
- ☐ **Dates and amounts of any estimated tax payments**

COVID Related Items:

- ☐ **IRS Notice 1444, Your Economic Impact Payment**
- ☐ **Verification of Covid-Related Retirement Account Withdrawals**
- ☐ **Verification of suspended RMDs (required minimum distributions)**

In order to support our employees, who may be required to work remotely, the firm may use third-party service providers in serving your account. We may share confidential information about you with these service providers and remain committed to preserving the confidentiality and security of your information. Accordingly, we maintain internal policies and procedures to protect the confidentiality of your personal information and will remain responsible for the work provided by any such third-party service provider.