

Your Name: _____

2020 FEDERAL AND STATE INCOME TAX CHECKLIST

I/We certify that I/We have read and answered the questions in this Checklist (*front & back*) to help my tax professional complete the most accurate 2020 Federal and State Income Tax Return. (*Please sign & date*) **This qualifies for a \$10 Discount on your preparation fee**

Taxpayer Signature	Spouse Signature	Date
During 2020 did you (or any dependents) have health insurance coverage through the Health Insurance Marketplace for any months (even one)? If "YES," we need your Form(s) 1095-A to prepare your return. [] YES - NO []		
During 2020 did you make any taxable purchases from out-of-state firms on which sales tax was NOT charged? If "YES," Check here and see page 4 of the 2020 Federal and State Income Tax Organizer. [] YES		
If "NO," IMPORTANT: By checking "NO," you are certifying that no sales or use tax is due [] NO		
At any time in 2020, did you have an interest in or a signature or other authority over a financial account in a foreign country including a bank, trust, online gambling, or other financial account? [] YES - NO []		
At any time in 2020, did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency A.K.A. cryptocurrency? If "YES," we will need additional information for reporting..... [] YES		
If "NO," IMPORTANT: You are certifying that you had no virtual currency transactions [] NO		
During 2020 did you pay the cost of ANY Medical, Dental, Drug, Vision or Other Health Care Insurance PREMIUMS with "After-Tax" dollars? This includes Medicare Part B and Part D and any other Medical Health Insurance deducted from your Pension or Paycheck. (Please provide details on a separate sheet) [] YES - NO []		
During 2020 did you pay the premiums toward a "Tax-Qualified" Long Term Care Insurance Policy? If "YES," you may be able to deduct a part or all of the cost of the insurance on your WI and/or Federal return. [] YES - NO []		
During 2020 did you or your employer make any contributions to, or participate in, a qualified Health Savings Account (HSA)? If "YES," please include complete details of your HSA and bring any Form 1099-SA or Form 5498-SA that you received. <i>This is not a Flexible Savings Accounts (FSA) thru your employer</i> [] YES - NO []		
IMPORTANT: Check here if you certify that all HSA distributions were used for qualified medical expenses <input type="checkbox"/>		
During 2020, did you take a distribution from a retirement plan or IRA? If "YES," we will need to determine if it qualifies as a Coronavirus distribution. [] YES - NO []		
During 2020 did you process a "Qualified Charitable Distribution" (QCD) from your Traditional IRA account? If "YES," we will need to see the transaction papers from your IRA account to the charitable organization..... [] YES - NO []		
During 2020 did you convert money from your traditional IRA account to a ROTH IRA? If "YES," please include complete details of this ROTH IRA Conversion..... [] YES - NO []		
During 2020 did you take a distribution from your Roth IRA AND you were under age 59 1/2 or had a Roth IRA for less than 5 years at the time of the distribution? If "YES," please include details of your Roth IRA contribution basis. [] YES - NO []		
During 2020 did you CONTRIBUTE to any retirement plan AND have income under \$32,500 if Single, \$48,750 if Head of Household, or \$65,000 if Married? If "YES," you may qualify for the "Retirement Savings Credit."..... [] YES - NO []		
During 2020 did you pay any tuition or related education expenses for yourself, your spouse, or dependents to attend any post-secondary institution? If "YES," you may qualify for a credit for these expenses. Please bring Form 1098-T from the eligible educational institution AND the "Billing Account Activity Statement" showing all activity that was paid by you, by loan or by the student along with scholarships and/or grants received. [] YES - NO []		
During 2020 did you pay interest on a qualified student loan? If "YES," you may be able to deduct up to \$2,500 of that interest. Please bring any Form 1098-E you receive (<i>Some may only be available online</i>) [] YES - NO []		
During 2020 did your employer deduct any Dependent or Child Care Benefits from your wages on a before-tax basis? If "YES," we will need the care provider's name, address & ID number. [] YES - NO []		
During 2020 did you have any dependents that had "Gross Income" of over \$1,100 (\$400 if self-employed)? If "YES," that dependent may be required to file a 2020 tax return. [] YES - NO []		
Were you claimed or will you be claimed as a dependent on anyone else's 2020 Federal or State tax return? If "YES," special rules may apply to you. [] YES - NO []		

During 2020 did you **BUY** or **SELL** or **REFINANCE** your home or any other Real Estate? If "YES," we will need the closing papers or settlement statements at the time of your tax interview appointment.[] YES - NO []

During 2020 did you receive any "Tip" income. If "YES," we will need to know if those tips were reported to your employer and on your W-2 or if they need to be added directly on your return.[] YES - NO []

During 2020 did you receive income from a Trust or Estate, Corporation, or Partnership? If "YES," you will need a Schedule K-1 to complete your tax return.[] YES - NO []

During 2020 did you have any Non-Taxable Income such as Veterans' Benefits, Workers Compensation, Public Assistance, Etc. If "YES," we will need a separate sheet with income details.[] YES - NO []

During 2020 were you involved in bankruptcy, foreclosure, repossession, or had any debt (including credit cards) cancelled? If "YES," we will need complete details and the tax forms that you received.[] YES - NO []

During 2020, did you make any charitable contributions of money or goods? If "YES," you must have a receipt or written record from the charity showing the name of the charity, the date, and the amount.[] YES - NO []

During 2020 did you contribute property such as used clothing, furniture, toys, etc. having a value of \$500 or more to a charitable organization? If "YES," please provide required documentation.[] YES - NO []

Did you claim the **First-Time Homebuyer credit on your 2008 tax return where you must repay the credit?** If "YES," please provide complete details[] YES - NO []

During 2020 did you pay \$2,200 or more to an individual for "Domestic" services performed in your home? If "YES," you need to file Form W-2 Statements as any other employer would have to do.[] YES - NO []

During 2020 did you start a business or purchase a rental property? If "YES," we will need complete details of the closing, Real Estate tax bill, your income and expenses, etc.[] YES - NO []

At the end of 2020, did you hold any stock or other investments that had become worthless during 2020? If "YES," we will need confirmation slips or other evidence of your investment loss.[] YES - NO []

At the end of 2020, were you or your spouse, if filing jointly, legally blind? If "YES," we will need a statement from your doctor.[] YES - NO []

During 2020 did you make or receive any gifts of over \$15,000 to or from any one individual? If "YES," the donor would be required to file a "Gift Tax" return.[] YES - NO []

At the end of 2020 did you hold any U.S. Savings Bonds that were issued in 1990 or earlier? If "YES," those bonds have reached final maturity and all accrued interest must be reported.[] YES - NO []

Do you wish to make a donation to any of the eight (8) WI state designated charitable programs? By answering "YES" you WILL increase your tax or reduce your refund.[] YES - NO []

During 2020 did you make a contribution to Wisconsin's "EdVest" or "Tomorrow's Scholar" College Savings Plans? If "YES," we will need the 2020 Year-End Statement for each beneficiary.[] YES - NO []

During 2020 did you pay for any Private School Tuition for grades K-12? If "YES," we will need information about the school, amount and each pupil. Please include complete details.[] YES - NO []

During 2020 did you own farmland that qualifies for the Wisconsin Farmland Preservation Credit? If "YES," we will need your '2020' property tax bill.[] YES - NO []

During 2020 did you receive benefits from the Federal Civil Service or Wisconsin State Teachers Retirement **AND were you a member of that retirement system on December 31, 1963?**[] YES - NO []

During 2020 did you receive income from Railroad Unemployment Insurance, Railroad Sickness Benefits, Railroad Retirement Benefits or from Military Retirement Benefits?[] YES - NO []

During 2020 were you - (**you need all three**) - under "**Minimum Retirement Age**", receiving "Disability" pension income with Distribution Code 3 in Box 7 of your Form 1099R, **AND** retired on '**total and permanent**' disability?. [] YES - NO []

During 2020 did you receive gambling income from a source located outside Wisconsin? If "YES," you may have to file a return for that state.[] YES - NO []

During 2020 did you pay Home Mortgage Interest secured by a 2nd home located outside the State of Wisconsin? If "YES," that interest is not deductible on the Wisconsin Tax Return.[] YES - NO []