



Tax Documentation Checklist – 2020 Tax Year Filing 2019

General Taxable Income

- Wages, Salaries, and Tips (*W-2 Form or Employer's End-of-Year Fiche*)
- Alimony Received or Paid
- Dividend Income Statements: Form 1099-DIV
- Interest Income Statements: Form 1099-INT & 1099-OID
- Miscellaneous Income: Form 1099-MISC
- Sales of Real Estate: Form 1099-S
- Sales of Stock, Land, etc.: Form 1099-B
- State Tax Refunds: Form 1099-G
- Unemployment Compensation Received
- Foreign Other Income Forms: Dividend, interest, investment sales, miscellaneous income

Retirement Income

- Social Security Income: Form SSA-1099
- Retirement Income: Form 1099-R

Business Income

- Self-employed Business Income and Expenses
- Form K-1 Income from Partnerships, Trusts, and S-Corporations
- Rental Income and Expenses
- Tax Deductible Miles Traveled for Business Purposes
- Foreign Own-Company Business Income and Expenses (balance sheet and income statement requested)

Tax Credits Checklist

- IRA Contributions
- Adoption Expense Information
- Child Care Provider Address, I.D. Number and Amounts Paid
- Child Care Expenses for Each Dependent
- Foreign Taxes paid

Expense and Tax Deduction Checklist – If Itemizing

- Charitable Cash Contributions
- Fair Market Value of Non-cash Contributions to Charities
- Home Mortgage Interest from Form 1098
- Home Second Mortgage Interest Paid
- Personal Property Taxes Paid
- Real Estate Taxes Paid
- State Taxes Paid with Last Year's Return (if itemized)
- Student Loan Interest Paid



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Tax Estimate Payments Checklist

- Estimated Tax Payments Made to IRS directly (or State)
- Last Year's Tax Return Overpayment Applied to This Year

Education Expenses

- Dependents' Post High School Educational Expenses
- Educational Expenses for You and Your Spouse

General Information

- Copy of Last Year's Tax Return – U.S. and Foreign (if applicable)
- Dependents' Names, Years of Birth, and Social Security Numbers
- Social Security Numbers for You and Your Spouse

- Bank Account Number (BAN) (For direct deposit/debit purposes)
- Routing Transmit Number (RTN) (For direct deposit/debit)

For tax questions or concerns, or to make an appointment, contact MIR TAXES LLC at info@mirtaxes.com.