

## 2020 CONTRIBUTIONS TO IRA, ROTH IRA, SEP, OR SIMPLE ACCOUNTS

Plan	TAXPAYER		SPOUSE	
	Date	Amount	Date	Amount
Traditional IRA				
Roth IRA				
SEP				
Simple				

You have until April 15, 2021 to make additional contributions for 2020. Please discuss this possibility with your preparer. Bring all 1099Rs regarding withdrawals, transfers, rollovers, and Roth IRA conversions to your interview.

## RETIREMENT ACCOUNT VALUES AS OF DECEMBER 31, 2020

If you withdrew money from your IRA or converted your regular IRA to a Roth during 2020, we need the value of all IRA, SEP, and SIMPLE accounts as of 12/31/20.

TAXPAYER		SPOUSE	
Account Name	December 31, 2020 Value	Account Name	December 31, 2020 Value

When you reach age 72 you must take a Required Minimum Distributions (RMD) from your retirement accounts. This is a change from the previous age 70½ requirement. The institution where the investment is held should help you with determining the amount to withdraw. If you need our help with this for withdrawals in 2021, we need your values as of 12/31/20.

For tax year 2020 the requirement for minimum distributions from retirement accounts was suspended. No minimum distributions were required in 2020.

Did you have a qualified COVID-19 related withdrawal from a retirement account in 2020? Yes \_\_\_ No \_\_\_

Are you interested in paying the tax on the COVID-19 withdrawal over a 3-year period? Yes \_\_\_ No \_\_\_

## STOCK / MUTUAL FUND / PROPERTY SALES

Provide all 1099B Forms – Proceeds from Broker and Barter Transactions

For sales of Real Estate provide all Settlement Statements (also known as Hud Statements or Closing Statements)

- Provide all information regarding BASIS of the items sold
  - BASIS is your cost if you purchased the item sold
  - BASIS could be the value at the time of death if you inherited property
  - BASIS is the donor's cost if you received the item as a gift

If you are unsure of your stock cost/basis, ask your broker for help.

If we must calculate your basis there will be an additional charge.

At any time during 2020, did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency? Yes \_\_\_ No \_\_\_