

SKALLYS TAX SERVICE 2020 TAX ORGANIZER

New Clients: Provide copies of last 2 years tax returns and copies of social security cards for you, spouse, and dependents.

Fill in this section only if you are a new client or have changes since last year.

	Taxpayer	Spouse
Social Security Number		
First Name & Middle Initial		
Last Name		
Date of Birth		
Email Address		
Phone Number		
Address		
City		
State and Zip Code		

Dependent Information

Name	Date of Birth	Social Security Number	Relationship	Is Your Dependent Disabled?	College Student?	Number of Months in Your Home

If there are any new dependents, we need a copy of their social security card.

If you, your spouse, or dependent received an Identity Protection PIN (IP PIN) from the IRS bring the annual IRS letter with the current PIN

PROVIDE THE FOLLOWING:

- Amount of the Stimulus check received in 2020.**
- W2 Forms – & year end pay stubs** from all employers
- 1099G** – for any unemployment benefits received by you
- W2G or 1099s – Gambling Income**
- 1099R FORMS for Retirement Income** – pension, IRA, 401K, Simple, Sep, Annuities, etc.
- SSA / RRB FORMS** – for Social Security OR Railroad Retirement benefits received during 2020
- 1099 FORMS** - interest, dividends, stock/property sales
If you have foreign bank accounts, we need the income and bank names and account numbers
- 1099SA FORMS** – for distributions from Health Savings Accounts
- 1098 FORMS** – mortgage interest payments
- 1098-E FORMS** - student loan interest payments
- 1098-T** – Tuition Statement and tuition payment details for education (see EDUCATION EXPENSES pg.5)
- 1095A FORMS** – health insurance information from the Marketplace
- K-1 FORMS** - from Partnerships, LLCs, Estates, Trusts and Sub-S Corporations
- 1099 FORMS** - for cancellation of debt or foreclosure
- CRP FORMS** – Certificate of Rent Paid forms from landlords
- 2021 PROPERTY TAX STATEMENTS** – you will receive one from your county in March 2021. Send a copy to us when you receive it. Do not send proposed statements – we cannot use them. **If anyone who is not your spouse, dependent, or a renter lived with you – we will need to know their income.**
- NONTAXABLE INCOME** – amount of Workers Comp, Veterans Benefits, Welfare Benefits, Scholarships, Grants, or any other income not shown on your tax return
- CLOSING / HUD / SETTLEMENT STATEMENTS** - for purchases, sales, or refinance of real estate
- MOVING EXPENSES** – for moves by Military personnel to a new job location – provide expenses paid for transportation, storage, travel, lodging
- ADOPTION DURING 2020** – expenses paid during 2020 and any employer provided benefit amount
- AMOUNT OF ALIMONY RECEIVED or PAID** – we need the recipient's name and social security number AND the date of your divorce
- GOVERNMENT CORRESPONDENCE** – bring any notices from IRS or State that you received during the year.

ITEMIZED DEDUCTIONS – Provide the following information to us.

We do not need to see your receipts. Keep receipts in your possession in case of audit by the government.

MEDICAL/DENTAL EXPENSES – do not include amounts paid with pre-tax dollars, flex spending accounts, health reimbursement accounts or any amount reimbursed by insurance.

MEDICAL Expenses Must Exceed 7.5% Of Income Before You Will Benefit from the Deduction

Doctors, Dentists, Chiropractors, Psychiatrists, Therapists, Eye Exams, Acupuncture	
Hospitals, Clinics, Anesthesiology, Lab Fees	
Nursing Home Care / Assisted Living	
Ambulance Fees	
Alcohol/Drug/Smoking Treatment	
Hearing Aids, Batteries, Repairs, Support Hose, Shoes, Prescribed Attire.	
Glasses, Contact Lenses, Cleaning Solution	
Lodging (Limited to \$50/day Per Person)	
Parking, Bus Fare, Taxicabs	

HEALTH INSURANCE PREMIUMS

Health Insurance Premiums	
Dental Insurance Premiums	
Prescription Drug Insurance Premiums	
Medicare Insurance Premiums paid directly (do not include premiums deducted from Social Security payments)	

LONG TERM CARE INSURANCE

	Taxpayer	Spouse
Premiums		
Name of Provider:		
Policy Number		

PRESCRIPTION DRUGS AND INSULIN

MEDICAL MILES DRIVEN	
To doctors, hospitals, drug stores, etc.	

TAXES

Real Estate Taxes Paid: Home	
2 nd Home	
Other	
Street Maint. /Storm Sewer Fees Pd Separately	
Minnesota Property Tax Refund Received	()
Car/Truck License Tab Renewal Fees	
If you purchased a vehicle – bring bill of sale	

INTEREST PAID - Bring 1098 forms issued by banks and mortgage companies. Bring closing statements for any new purchase, sale, or refinance. Loans not used to buy/build residence are not deductible

Name of Bk / Mortgage Co.	Amount Paid
Interest Paid to Individuals on Contract for Deeds or Mortgages	Amount Paid
Name:	Soc. Sec. #
Address:	
Margin Account Interest – (Bring Brokerage Account Year End Statement)	

CONTRIBUTIONS - You must have bank records or written acknowledgement for donations (we do not need to see receipts)

Churches and Synagogues	
AA / Al-anon / Alateen	
Alumni Funds / Arts & Science	
Boy Scouts / Girl Scouts	
Cancer Fund / Heart / MS / MD	
Public Radio / TV	
United Way / Red Cross / Food Shelf	
Various Others	
Out Of Pocket Volunteer Expenses e.g. Coaching Uniform, Hotel Expense, Air Fare, Meals	
Number of Miles Driven for Volunteer Work e.g., Coaches, Scout Leaders, Choir Members, AA Members, Volunteer Board Members	

NON-CASH DONATIONS – You Must Provide the Following:

Organization	Date Donated	Items Donated	Estimated Cost	Fair Market Value

Search the Web for “fair market value of donated goods” to get suggested values
You must have a receipt from the organization where you made the donation

MISCELLANEOUS DEDUCTIONS MUST EXCEED 2% OF INCOME BEFORE YOU WILL BENEFIT FROM THE DEDUCTION

See Page 4 for Employee Business Expenses Due To Business Meals, Travel, & Vehicle Expenses

Union Dues/Working Dues	
Professional Dues / Licenses	
Tools/ Job Supplies/Safety Equipment	
Uniforms – Cost / Professional Cleaning	
Protective Clothing – Hard Hats, Safety Shoes, Safety Glasses	
Physical Exams Required by Employer	
Telephone Costs Directly Related to Work (2 nd phone, special features, long distance charges)	
Job Related Education – Tuition, Fees, Books, Supplies, Workshops, Seminars	
Job Related Books, Publications	
Malpractice Insurance	
Job Seeking Expense – Resume, Postage, Etc.	
Job Seeking Miles	
Employment Agency Fees	
Impairment-related Work Expenses of Person With a Disability	
Federal Estate Tax on Income in Respect of Decedent	
Gambling Losses (Enter losses only to the extent of gambling winnings reported as income)	

NO LONGER DEDUCTIBLE – tax preparation fees, safe deposit box rental, investment publications, costs related to investments, broker fees for managed accounts, IRA/SEP account fees

CASUALTY / THEFT LOSSES – If you sustained such a loss call your preparer about what to bring to your interview.

ESTIMATED TAX PAYMENTS

FEDERAL

STATE

	DUE DATE	DATE PAID	CHECK NUMBER	AMOUNT PAID	DATE PAID	CHECK NUMBER	AMOUNT PAID
4 th Qtr. Paid in 2020 for 2019 to the State	1 – 15 – 2020						
1 st Qtr. 2020	4 – 15 – 2020						
2 nd Qtr. 2020	6 – 15 – 2020						
3 rd Qtr. 2020	9 – 15 – 2020						
4 th Qtr. 2021*	1 – 15 – 2021						

*Be sure to list the 4th quarter payment for both Federal and State whether you paid it in 2020 or 2021

CHILD AND DEPENDENT CARE EXPENSES - Even if you paid your dependent care expenses through a payroll deduction plan you must provide the following information

	YES	NO
Were dependent care services performed in your home? If yes, you may be required to file W2s on behalf of your provider. Call for more information.		
Were you reimbursed for childcare expense through an employer-sponsored plan? If yes, indicate the amount of the reimbursement if it isn't listed on your W2		
Amount of Employer provided dependent care benefits that were forfeited in 2020		
Show child care expenses for children under age 13. If a child reached age 13 during the year show the expense paid before the child's birthday.		

Name(s) Of Individual/Organization Who Provided Care	Address	Social Security Or Employer ID Number	Amount Paid

If more space is needed, attach a statement. You cannot take credit for amounts paid to your dependents.

ENERGY CREDITS– Check www.energystar.gov to be sure your expenses qualify

Enter total amount of costs for:

Insulation*		Advanced Main Air Fan	
Exterior Windows/Skylights*		Solar Electric Property	
Metal/Qualified Asphalt Roofs*		Solar Water Heating Property	
Exterior Doors*		Small Wind Energy Property	
Gas, Propane, Oil Furnace		Geothermal Heat Pump	
Hot Water Boiler		Qualified Fuel Cell Property	

***INCLUDE ONLY MATERIALS COST**

NEW CLIENTS – we need to know amount of energy credit taken in 2006 and 2007, and 2009 thru 2019 - please bring tax returns for the years any energy credit was taken

If you purchased a new electric vehicle you may be eligible for a tax credit. Bring the information about this credit supplied to you by the dealer which should include your VIN number