

Heemer Klein & Company, PLLC

Accounting and Tax Services

2020 TAX DATA SHEET

	TAXPAYER (HUSBAND)	TAXPAYER (WIFE)
NAME		
SOC. SEC. #		
DRIVERS LIC. #		
LIC ISSUE DATE		
LIC. EXP. DATE		
OCCUPATION		
DATE OF BIRTH		
HOME ADDRESS		CITY, ST, ZIP
TELEPHONE #	HOME () -	BUSINESS () -
	CELL () -	SCHOOL DISTRICT
EMAIL ADDRESS		

CHILDREN AND / OR DEPENDENTS – USE BACK IF NEEDED

NAME (FULL)	SOC. SEC. #	RELATIONSHIP	BIRTH DATE	MONTHS AT HOME	CHILD CARE EXPENSES

BANK ACCOUNT INFORMATION FOR DIRECT DEPOSIT OF REFUND

Providing this information will significantly decrease the time required to receive your refund!

Bank Name: _____ Account Type Chking _____ Savings _____ Joint? _____
 Routing Number _____ Account Number _____

BRING THIS TAX INFORMATION WITH YOU

- All W2's from your employer
- All Interest and Dividend Income Statements (1099 INT, 1099 DIV, 1099B Statements) from banks, credit unions, and brokerage firms
- Social Security statements (SSA-1099)
- Real Estate tax bills for 2020(paid or not) and for previous years paid in 2020.
- Any other income statements for miscellaneous income, alimony, prizes, state & local tax refunds, lottery winnings (W2G), etc.
- Tuition information for each college student (1099T) and a list of all related college expenses
- If this is your first year with Heemer Klein, we need a copy of your 2018 and 2019 tax returns to best prepare your 2020 return.
- If you were in the health care marketplace and received a government subsidy, you should have received a form **1095-A**. We must have this form to reconcile your premiums.



2020 ESTIMATED TAX PAYMENTS PAID (TAXPAYER MUST COMPLETE, IF APPLICABLE)

	FEDERAL ESTIMATES		STATE ESTIMATES		CITY ESTIMATES	
	AMOUNT	CHECK# & DATE	AMOUNT	CHECK # & DATE	AMOUNT	CHECK# & DATE
4/15/20						
6/15/20						
9/15/20						
1/15/21						

Tax Updates

- Please see our web-site www.hkgicpa.com for the latest tax updates and information.
- Major tax legislation was passed in December 2017 (See our website – News Tab and Tax Tips for details). Many provisions will apply for 5-10 years and some are permanent.

Schedule A Itemized Deduction Worksheet:

The following information will be required if you plan on itemizing your deductions. The standard deductions are as follows: married filing **jointly (\$24,800)**, married filing separately and **single filers (\$12,400)**, and **head of household (\$18,650)**.

Please be advised that paid bills and cancelled checks claimed as deductions must be kept for a period of at least three years to comply with tax regulations and audit procedures. **DO NOT CLAIM** as deductions any bills that have not actually been paid within the calendar year of 2020.

MEDICAL	CONTRIBUTIONS	TAXES	
Dentist -	CASH OR CHECKS - ALL CONTRIBUTIONS MUST HAVE BOTH STATEMENTS AND CANCELED CHECKS TO QUALIFY	This category is limited to \$10,000 WITH all State and Local Income Taxes.	
Doctors -		Home Property Taxes -	
Hospital -		Cottage -	
Ins. Reimbursement -		Public Radio /TV -	Land -
Lodging Expenses -		Other -	License Tabs -
Long Term Care Premiums -	NON CASH - IF OVER \$500 MUST HAVE DETAILED LIST AND VALUE OF DONATION WITH NAMES AND ADDRESSES	Interest Expenses	
Medial Insurance – other than Medicare -		Home Mortgage -	
Miles Driven		*Home Equity -	
Prescription Drugs		**LAND CONTRACTS -	
Other (glasses etc) -		Charitable Mileage -	

*For Home Equity Loan – deductible only if used to purchase or improve home

**For Land Contracts - We need the name and address of the owner

ADDITIONAL INFORMATION WE MAY NEED	
*Alimony – paid (or received) -	
Date Divorce agreement executed -	
**Child Care expenses (12yrs/under)-	
Gambling losses -	
IRA Contributions made before April 15, 2021 -	
Did you contribute to a Health Savings Acct (HSA)? (Do NOT include employer's contributions.)	
Did you receive an Economic Impact Payment? If so, what was the total amount?	

*Must have name and SS# of recipient

**Must have name/address/ID# of caregiver

