We realize you have many options when it comes to tax preparation and we are grateful you chose us. Filing the 2020 taxes will be very challenging and we are here to help ease the stress. Please take a look at this list as you gather your paperwork for 2020.

***IDENTIFICATION/BANK INFO:***

* Current picture ID
* Proof of social security number (new clients & those getting the debit card)
* Social Security cards for any new dependants
* Routing & Account Numbers for direct deposit (use check not deposit slip)

***INCOME STATEMENTS:***

* W-2’s from each place you were employed in 2020
* W-2 G’s from any gambling winnings
* All 1099’s including (but not limited to)
* (1099 INT/1099 DIV) Interest/Dividends earned from banks and other investments
* (1099-NEC) Self Employment Income

***\*\*Do you have an HSA?***

You will receive a form that states how much money was contributed and how much money was spent. Please look for these forms.

* (1099 Misc) Rental Income, Other Income
* (1099-R) Pension, Annuity, Retirement plan distributions
* **(1099-G) Unemployment/**State Tax Refund
* (1099-B) Broker Statements (ex: sale of stocks, stock options, etc)
* (1099-C) Cancellation of Debt (forgiveness of debt)
* (SSA-1099) Social Security Benefits
* \*\*(1099-SA) HSA Distribution/(5498-SA) HSA Contribution

***CONTRACT LABOR/SELF- EMPLOYMENT INFORMATION:***

* Add all income earned from self- employment or contract labor
* Separate and total all expenses incurred as a result of your self-employment income such as supplies, tools, materials, business vs personal miles driven, car expenses, etc
* **CHECKLIST FOR DAY CARE PROVIDERS AVAILABLE ON OUR WEBSITE**

***ITEMIZED DEDUCTIONS: (BRING IT IN—YOU MAY STILL BE ABLE TO ITEMIZE)***

NEW FOR 2020

CASH DONATIONS UP TO $300 ARE DEDUCTIBLE WITHOUT HAVING TO ITEMIZE!

* Medical, dental or eye care expenses including ***after-tax*** insurance premiums
* Real Estate Taxes
* Personal Property Taxes (boats, cars, trailers, etc) (MTR VEH TAX on pink slip)
* Sales Tax paid on vehicles, motorcycles, RV’s, planes & boats
* Home Mortgage Interest (Form 1098) from each mortgage if more than one
* Cash charitable contributions (Church, Salvation Army, United Way, etc)
* Non cash charitable contributions (clothing, furniture, etc)

***EDUCATION EXPENSES:***

* (1098-T) Tuition, deductible expenses for education (must have to claim any education credits)
* (1098-E) Student Loan interest (must have to claim student loan interest)

***CHILD CARE EXPENSES:***

* Provider name, address, EIN or social security number
* Amount paid for each child

***AFFORDABLE CARE ACT:***

* (1095-A) IF INSURANCE IS FROM THE MARKETPLACE AKA OBAMACARE ***YOU MUST WAIT FOR THIS FORM.***

If there are any questions as to whether you should bring something or not, the best advice is to bring it with you. Associated Tax has been in business of preparing tax return for over 40 years now! We look forward to hearing from you soon. **Please check out our website at** [**www.associatedtaxomaha.com**](http://www.associatedtaxomaha.com)**!**

Important Changes Due to COVID-19 &

STIMULUS Info

Below are a few of the changes for 2020 (all taxes done in 2021) that we need to make you aware of:

1. **4523 N 30th St Changes**

* The 4523 N 30th office will not be open this tax season. All taxes will be prepared at our location at ***4800 Dodge St***
* ***Page & Jim will be available at our 4800 Dodge St office all tax season (by appointment)***
* Hours are Monday-Saturday 9am-5pm

1. COVID-19 Precautions taken

* ***Tax Preparation by Appointment Only*** ***at 4800 Dodge St*** (***call either numbers 402-453-9999 or 402-551-1755 to set up appointment time)***
* Desk extensions installed to create more space between the client and tax preparer
* Social distancing
* Sanitizing often and after each client

1. STIMULUS MONEY

* The actual amount that you are eligible for is calculated on your 2020 return (some clients may now qualify that did not before)
* WE WILL NEED TO KNOW the amount you received from both the first and second payment (if any) prior to completing your 2020 return
* Knowing the amount you received prior will help prevent delays in processing your refund
* If you did not receive the correct amount of Stimulus money you will get it with your 2020 refund (or it will lesson your balance due).
* ***2nd Stimulus Payment Issues*** (there was a slight hiccup when processing the 2nd round of stimulus with some payments, particularly those that had their fees come out of their refunds)!
  + IF YOU HAVE NOT RECEIVED THE 2ND PAYMENT, YOU WILL GET IT WITH YOUR REFUND
  + CHECK IRS.GOV FOR PAYMENT INFORMATION

See Back for What to Bring Checklist