

Reminder List of Common Items Needed

- ✓ W-2's, Pension/IRA forms
1099-R
- ✓ Interest & Dividend Statements
- ✓ Unemployment Form 1099-G
- ✓ Social Security Income
- ✓ Mortgage Interest
- ✓ Cost of vehicle plates
- ✓ Property Taxes (Summer &
Winter)
- ✓ Marketplace Insurance Form
1095 A
- ✓ Donations (cash & value of
non-cash)
- ✓ Changes in dependents or
address
- ✓ Child Support/ Alimony
Received
- ✓ College Tuition, books &
supplies
- ✓ Voided check for Direct Deposit
- ✓ Student Loan Interest

Some of What Is New For 2020

The Stimulus payment will not be taxable. However, I will need to know how much you received. If you did not receive the full amount or if you did not receive any amount you may qualify for a credit on your tax return.

Unemployment Benefits - Many people, who normally do not receive unemployment, did this year. Be sure to give us the 1099G that will be mailed to you by the State or print it off your MiWam account.

Donations – Everyone (even if you don't itemize) can take a deduction for donations (up to \$300). So please let me know how much you had in donations.

RMD's (Required Minimum Distributions) – There was no requirement to take distributions from your IRA's in 2020. Also, the age at which you must take a distribution has been changed from 70 ½ to 72.