

**ELE-Peagler LLC**  
**18700 W. Ten Mile Road, Ste 100, Southfield, MI 48075**

Offc: (248) 356-6555; Direct: (248) 763-9114

Email: [dpeagler@elewealth.com](mailto:dpeagler@elewealth.com)

**2020 Income Tax Checklist**

Forms	Yes (✓)	No (✓)
<b><u>INCOME</u></b>		
W-2 (Wages)		
1099-R (Pension, IRA, deferred savings: 401k, 403b, 457)		
1099-G - Unemployment, 2020 State, City Refunds if you Itemized in 2019		
1099 NEC, Schedule C- Contract Worker (no tax withheld)		
Schedule E - Rental Property (income, expenses)		
1099 B - Sale of Investments - Schedule D		
1099 DIV - Dividend Income		
1099 Int - Interest (Bank, Credit Union, Bonds, etc.)		
1099 SA - Social Security (see pink background)		
<b><u>ADJUSTED INCOME</u></b>		
F3903 Moving Expenses - <u>Military ONLY</u>		
IRA Deduction		
Student Loan Interest		
Educator Expense		
HSA (Health Savings Acct.), Self Employment Health Insurance (SEP)		
Q.B.I.D: Qualified Business Income Deduction (20% of net profit)	N/A	N/A
<b><u>TAX &amp; CREDITS</u></b>		
Sch A-Itemized Deductions (medical, charity, mortgage interest, property taxes, license tag renewal, State/Local taxes paid in 2020)		
Child Tax Credit (children) Number of Children under age 17		
Other Dependents (children age 17 and up), others who qualify		
F-2441 Child & Dependent Care Expenses		
Earned Income Tax Credit (EITC)		
<b><i>ALL CLIENTS:</i></b> Currently dated picture identification (D/L, State ID); Social Security Cards should be on file		
<b><i>NEW CLIENTS:</i></b> Provide a copy of 2019 tax returns		

***This checklist covers the basics. Depending on your tax situation, you may receive additional tax forms (ex: K-1, 1099-Q, 1099-OID, 1099-C, 1099-S, 1099-K, 1099-MISC, etc.). Casualty losses can be claimed subject to declaration of a disaster.***