

Employee Business Expenses (MN only)

- ✓ Union Dues
- ✓ Safety Equipment
- ✓ Uniforms & Their Upkeep
- ✓ Job-related Continuing Ed
- ✓ Job-seeking Expenses
- ✓ Job-related Travel Expenses
- ✓ Job-required Tools & Equipment

Additional Info for MN

Qualified School Expenses for K-12

Rent Credit (CRP)

Property Tax Statement Payable in 2020
(the one that comes in March)

Charitable Contributions if over \$500

Long-term Care (Nursing Home) insurance premiums

Misc. Info Needed

Name, SS#, Birthdates for Spouse & Dependents

Bank Information for Direct Deposit

*To combat ID theft, we will be asking for a copy of your Driver's License, or other photo ID.



Peshel Accounting

Tel: 218.365.2424

www.askjean.net

Peshel Accounting



Tax Preparation Checklist

We love numbers, so you don't have to!

1704 East Camp Street
PO Box 89
Ely, MN 55731
(Corner of 17th Ave & Camp St)

Phone: 218.365.2424

Fax: 218.365.7399

jpeshel@gmail.com

www.askjean.net

Types of Income

W-2's from Wages & Salaries

Interest & Dividends

Sale of Property or Stocks

Other Types of Investment Incomes

Pensions & IRA Distributions

Social Security

State or Local Tax Refunds

Alimony Received

Unemployment Benefits

Tip Income

Gambling & Lottery Winnings

Prizes & Awards

Hobby Income

Jury Duty Pay

Income from Trusts & Estates

Business Incomes

K-1's from Partnerships & corporations

Rental Income & Expenses

Self-employment Income & expenses

Misc. Deductions

Contributions to IRA's

Student Loan Interest Paid

Alimony Paid

Penalties on Early Withdrawals of Savings

Health Savings Account Deductions

Teacher Classroom Expenses

Other Tax Items

Daycare Expenses (need name, address & SS# of daycare provider)

Tuition Expenses for post-secondary Education **Books and supplies may also qualify this year

Adoption Expenses Incurred

IMPORTANT: If you had your health insurance through MNsure, please include form 1095A with your tax information.

As of this writing, no start date has been announced for 2020. Ending date will be April 15, 2020.

Reminder: If we did not check to see if you were eligible for a property tax refund based on the property tax statement payable in 2020, please include it with your tax documents.

Schedule A Deductions

Please note: Some of these expenses are no longer allowable on the Federal return. However, all these Schedule A expenses are still allowable on MN.

Medical:

Insurance Premiums

Prescriptions

Doctor, Dentist, Eye Doctor

Hospital Expenses

Glasses & Contacts

Hearing Aids & Batteries

Other Types of Medical Aids

Nursing Home Ins. Premiums
(name & policy #)

Out-of-town Lodging

Transportation & Mileage

Medically Required Alterations
to Home (i.e. ramps, etc.)

Stop Smoking & Weight-loss
Programs

Some Types of Counseling or
Therapy

Mortgage Interest

Buy or sell a home? Bring in
closing statement

Property Taxes Paid

Cost of License Tabs

Charitable Contributions – both cash
& merchandise

Out-of-Pocket Volunteer Expenses

Safety Deposit Box Rental

Investment Expenses

Tax Preparation Fees including Tax
Software Packages

Gambling Losses if Reporting
Winnings

Sales Tax Paid on Purchase of New
Vehicle, Boat, or Building of Home