McVay Business Services

Income Tax, Payroll & Accounting
Accurate, Affordable & Complete

Personal information:

The IRS needs to know exactly who's filing and who is covered in your tax return. To do this, you will need Social Security numbers and dates of birth for you, your spouse, and your dependents. Please include your email address at top or bottom of this sheet.

Information about your income:

- Income from jobs: forms W-2 for you and your spouse
- Investment income—various forms 1099 (-INT, -DIV, -B, etc.), K-1s, stock option information
- Income from state and local income tax refunds and/or unemployment: forms 1099-G
- Taxable alimony received (Applicable to divorces finalized before January 1, 2019)
- Business or farming income—profit/loss statement, capital equipment information
- If you use your home for business—home size, office size, home expenses, office expenses.
- IRA/pension distributions—forms 1099-R, 8606
- Rental property income/expense—profit/Loss statement, rental property suspended loss information
- Social Security benefits—forms SSA-1099
- Income from sales of property—original cost and cost of improvements, escrow closing statement, cancelled debt information (form 1099-C)
- Prior year installment sale information—forms 6252, principal and Interest collected during the year, SSN and address of payer
- Other miscellaneous income—jury duty, gambling winnings, Medical Savings Account (MSA), scholarships, etc.

Adjustments to your income:

The following can help reduce the amount of your income that is taxed, which can increase your tax refund or lower the amount you owe.

- IRA contributions
- Energy credits
- Student loan interest
- Medical Savings Account (MSA) contributions
- Moving expenses (for tax years prior to 2018 only for federal returns but your state might still allow it)
- Self-employed health insurance payments
- Keogh, SEP, SIMPLE and other self-employed pension plans
- Alimony paid that is tax deductible (Applicable to divorces finalized before January 1, 2019)
- Educator expenses

2020 Standard Deduction Amounts

Filing Status	2020 Standard Deduction
Single; Married Filing Separately	**$12,400**
Married Filing Jointly	**$24,800**
Head of Household	**$18,650**

2020 Federal Income Tax Brackets and Rates

Rate	For Single Individuals	For Married Individuals Filing Joint Returns
12%	$9,876 to $40,125	$19,751 to $80,250
22%	$40,126 to $85,525	$80,251 to $171,050
24%	$85,526 to $163,300	$171,051 to $326,600
32%	$163,301 to $207,350	$326,601 to $414,700

[redacted] Summary Organizer
Personal and Dependent Information

Personal Information

	Name	SSN	Date of birth
Taxpayer			
Spouse			

Street address, city, state, and ZIP

	Occupation	Daytime phone	Evening phone	Cell phone
Taxpayer				
Spouse				

Taxpayer email	
Spouse email	

Marital Status at end of 2019

- ☐ Married
- ☐ Married filing separately
- ☐ Single
- ☐ Widow(er) — If spouse died in 2019 enter the date of death ____________

Other information

	Taxpayer		Spouse	
Are you blind?	☐ Yes	☐ No	☐ Yes	☐ No
Are you disabled?	☐ Yes	☐ No	☐ Yes	☐ No
Are you a full-time student?	☐ Yes	☐ No	☐ Yes	☐ No
Do you want $3 to go to the Presidential Election Campaign Fund?	☐ Yes	☐ No	☐ Yes	☐ No

Dependent Information

First and last name	SSN	Relationship	Months in home	Date of birth	Disabled	Full-time student

List dependents required to file a return ____________

Estimates

	Federal		Resident state		Resident city	
	Date paid	Amount	Date paid	Amount	Date paid	Amount
Overpayment applied from 2018						
First quarter						
Second quarter						
Third quarter						
Fourth quarter						
Additional payments						

Account Information for Deposits or Withdrawals

Name of bank	Bank routing number	Bank account number	Type of account		Use this account for	
			Checking	Savings	Deposits	Withdrawals

Appointment Information

Your 2019 appointment is scheduled for ____________