



November 2020

Dear Tax Client:

Enclosed please find the 2020 tax highlights brochure and worksheet(s) for tax planning. If you use a different method to record your information, please review the enclosed worksheets so the information listed will remind you of the information needed for your planning.

All our worksheets are available on our website at [www.kk-cpa.com](http://www.kk-cpa.com) under Resources – Tax Forms.

In addition to completing the tax worksheets, please complete the tax planning information listed below. This will help provide more accurate and beneficial tax planning.

**If possible, please bring or mail your worksheets to our office 7 days before your appointment.**

**All 1099s and W-2s are due to the IRS by January 31, 2021.** If you have a farm or business and need to issue 1099s and have the information available, please bring along to your tax planning appointment (see enclosed blue 1099 information sheet). Additionally, if you paid wages that require W-2s to be filed, please bring that information along if available.

2020 Planning Information

**\* ESTIMATE IF NECESSARY \***

	<b>Taxpayer</b>	<b>Spouse</b>
Gross wages (Both spouses if applicable)	_____	_____
Federal withholding from wages	_____	_____
State withholding from wages	_____	_____
Interest and dividend income	_____	_____
Contributions	_____	_____
Medical expenses (if large)	_____	_____
Health insurance premiums	_____	_____