COVER PAGE

Filing Checklist for 2020 Tax Return Filed On Standard Forms

Prepared on: 04/15/2021 10:06:26 am

Return: C:\Users\ishapiro\Desktop\temp\AMY ADAMS 2020 Tax Return.T20

To file your 2020 tax return, simply follow these instructions:

Step 1. Sign and date the return

Because you're filing a joint return, AMY and JOHN both need to sign the tax return.

If your return is signed by a representative for you, you must have a power of attorney attached that specifically authorizes the representative to sign your return. To do this, you can use Form 2848, Power of Attorney and Declaration of Representative.

Step 2. Assemble the return

These forms should be assembled behind Form 1040: U.S. Individual Income Tax Return

- Form 1040-V

Staple these documents to the front of the first page of the return:

Form W-2: Wage and Tax Statement

1st (MFA)

Step 3. Pay the balance due on your taxes

Make your check or money order for $23893 payable to "United States Treasury." Don't send cash.

Write the following on your check or money order:

- "2020 Form 1040" or "2020 Form 1040-SR"
- AMY's name and address
- AMY's daytime phone number
- AMY's Social Security Number

On the right side of the check or money order write the dollar amount of the payment, like this: $23893.00.

Don't staple or otherwise attach the payment to the return. Instead, just place it loose in the envelope with the return.

Step 4. Mail the return

Mail the return to this address:

Department of the Treasury
Internal Revenue Service Center
[Please enter your state on Background Worksheet.]

We recommend that you use one of these IRS-approved methods to send your return. Retain the proof of mailing to avoid a late filing penalty:

- U.S. Postal Service certified mail.
- DHL Express, Express 9:00, Express 10:30, Express 12:00, Express Worldwide, Express Envelope, Import Express 10:30, Import Express 12:00, and Import Express Worldwide.
- FedEx First Overnight, Priority Overnight, Standard Overnight, 2 Day, International Next Flight Out, International Priority, International First, or International Economy.
- UPS Next Day Air Early A.M., Next Day Air, Next Day Air Saver, 2nd Day Air, 2nd Day Air A.M., Worldwide Express Plus, or Worldwide Express.

Step 5. Keep a copy

Print a second copy of the return for your records. We recommend that you also print and retain these supporting forms, which don't need to be sent to the IRS:

- - Background Worksheet
- - Form 1099-G

2020 return information - Keep this for your records

Here is some additional information about your 2020 return. Keep this information with your records.

You will need your 2020 AGI to electronically sign your return next year.

Quick Summary

Income	$170,000

Adjustments	-	$0
Adjusted gross income		**$170,000**
Deductions	-	$24,800
Taxable income		**$145,200**
Tax withheld or paid already		$0
Actual tax due	-	$23,893
Refund applied to next year	-	$0
You Owe		**$23,893**

Form **1040** Department of the Treasury—Internal Revenue Service (99) **U.S. Individual Income Tax Return** **2020** OMB No. 1545-0074 IRS Use Only—Do not write or staple in this space.

Filing status Check only one box. ☐ Single ☒ Married filing jointly ☐ Married filing separately (MFS) ☐ Head of household (HOH) ☐ Qualifying widow(er) (QW)

If you checked the MFS box, enter the name of your spouse. If you checked the HOH or QW box, enter the child's name if the qualifying person is a child but not your dependent. ▶

Your first name and middle initial	Last name	Your social security number
AMY	ADAMS	048-99-9999
If joint return, spouse's first name and middle initial	Last name	Spouse's social security number
JOHN	ADAMS	049-99-9999

Home address (number and street). If you have a P.O. box, see instructions. | Apt. no.

City, town, or post office. If you have a foreign address, also complete spaces below. | State | ZIP code

Foreign country name | Foreign province/state/county | Foreign postal code

Presidential Election Campaign Check here if you, or your spouse if filing jointly, want $3 to go to this fund. Checking a box below will not change your tax or refund. ☐ You ☐ Spouse

At any time during 2020, did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency? ☐ Yes ☒ No

Standard Deduction **Someone can claim:** ☐ You as a dependent ☐ Your spouse as a dependent ☐ Spouse itemizes on a separate return or you were a dual-status alien

Age/Blindness **You:** ☐ Were born before January 2, 1956 ☐ Are blind **Spouse:** ☐ Was born before January 2, 1956 ☐ Is blind

Dependents (see instructions):

(1) First name Last name	(2) Social security number	(3) Relationship to you	(4) Check if qualifies for (see instructions): Child tax credit	Credit for other dependents
If more than four dependents, see instructions and check here ▶ ☐			☐	☐
			☐	☐
			☐	☐
			☐	☐

Attach Sch. B if required.

1	Wages, salaries, tips, etc. Attach Form(s) W-2				1	150,000
2a	Tax-exempt interest	2a	0	b Taxable interest	2b	0
3a	Qualified dividends	3a	0	b Ordinary dividends	3b	0
4a	IRA distributions	4a		b Taxable amount	4b	0
5a	Pensions and annuities	5a		b Taxable amount	5b	0
6a	Social security benefits	6a		b Taxable amount	6b	
7	Capital gain or (loss). Attach Schedule D if required. If not required, check here ▶ ☐				7	0
8	Other income from Schedule 1, line 9				8	20,000
9	Add lines 1, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your **total income** ▶				9	170,000
10	Adjustments to income:					
a	From Schedule 1, line 22	10a	0			
b	Charitable contributions if you take the standard deduction. See instructions	10b	0			
c	Add lines 10a and 10b. These are your **total adjustments to income** ▶				10c	0
11	Subtract line 10c from line 9. This is your **adjusted gross income** ▶				11	170,000
12	**Standard deduction or itemized deductions** (from Schedule A)				12	24,800
13	Qualified business income deduction. Attach Form 8995 or Form 8995-A				13	0
14	Add lines 12 and 13				14	24,800
15	**Taxable income.** Subtract line 14 from line 11. If zero or less, enter -0-				15	145,200

Standard Deduction for-
- Single or Married filing separately, $12,400
- Married filing jointly or Qualifying widow(er), $24,800
- Head of household, $18,650
- If you checked any box under *Standard Deduction,* see instructions.

16	**Tax** (see instructions). Check if any from Form(s): 1 ☐ 8814 2 ☐ 4972 3 ☐		16	23,524
17	Amount from Schedule 2, line 3		17	0
18	Add lines 16 and 17		18	23,524
19	Child tax credit or credit for other dependents		19	
20	Amount from Schedule 3, line 7		20	0
21	Add lines 19 and 20		21	0
22	Subtract line 21 from line 18. If zero or less, enter -0-		22	23,524
23	Other taxes, including self-employment tax, from Schedule 2, line 10		23	0
24	Add lines 22 and 23. This is your **total tax** ▶		24	23,524
25	Federal income tax withheld from:			
a	Form(s) W-2	25a 0		
b	Form(s) 1099	25b 0		
c	Other forms (see instructions)	25c 0		
d	Add lines 25a through 25c		25d	0
26	2020 estimated tax payments and amount applied from 2019 return		26	0
27	Earned income credit (EIC) NO	27		
28	Additional child tax credit. Attach Schedule 8812	28		
29	American opportunity credit from Form 8863, line 8	29		
30	Recovery rebate credit. See instructions	30		
31	Amount from Schedule 3, line 13	31 0		
32	Add lines 27 through 31. These are your **total other payments and refundable credits** ▶		32	0
33	Add lines 25d, 26, and 32. These are your **total payments** ▶		33	0

- If you have a qualifying child, attach Sch. EIC.
- If you have nontaxable combat pay, see instructions.

Refund

34	If line 33 is more than line 24, subtract line 24 from line 33. This is the amount you **overpaid**	34	
35a	Amount of line 34 you want **refunded to you.** If Form 8888 is attached, check here ▶ ☐	35a	
▶ b	Routing number XXXXXXXXX ▶ c Type: ☐ Checking ☐ Savings		
▶ d	Account number XXXXXXXXXXXXXXXXX		
36	Amount of line 34 you want **applied to your 2021 estimated tax** ▶ 36		

Direct deposit? See instructions.

Amount You Owe

37	Subtract line 33 from line 24. This is the **amount you owe now** ▶	37	23,893
	Note: Schedule H and Schedule SE filers, line 37 may not represent all of the taxes you owe for 2020. See Schedule 3, line 12e, and its instructions for details.		
38	Estimated tax penalty (see instructions) ▶ 38 369		

For details on how to pay, see instructions.

Third Party Designee

Do you want to allow another person to discuss this return with the IRS? See instructions ▶ ☐ **Yes.** Complete below. ☒ **No**

Designee's name ▶ | Phone no. ▶ | Personal identification number (PIN) ▶

Sign Here

Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Your signature	Date	Your occupation	If the IRS sent you an Identity Protection PIN, enter it here (see inst.) ▶
		ARTIST	
Spouse's signature. If a joint return, **both** must sign.	Date	Spouse's occupation	If the IRS sent your spouse an Identity Protection PIN, enter it here (see inst.) ▶
		ENGINEER	
Phone no.		Email address	

Joint return? See instructions. Keep a copy for your records.

Paid Preparer Use Only

Preparer's name	Preparer's signature	Date	PTIN	Check if: ☐ Self-employed
Firm's name ▶			Phone no.	
Firm's address ▶			Firm's EIN ▶	

SCHEDULE 1
(Form 1040)

Department of the Treasury
Internal Revenue Service

Additional Income and Adjustments to Income

▶ **Attach to Form 1040, 1040-SR, or 1040-NR.**
▶ **Go to *www.irs.gov/Form1040* for instructions and the latest information.**

OMB No. 1545-0074

2020

Attachment Sequence No. **01**

Name(s) shown on Form 1040, 1040-SR, or 1040-NR	**Your social security number**
AMY ADAMS	048-99-9999

Part I Additional Income

1	Taxable refunds, credits, or offsets of state and local income taxes	**1**	0
2a	Alimony received	**2a**	
b	Date of original divorce or separation agreement (see instructions)▶		
3	Business income or (loss). Attach Schedule C	**3**	0
4	Other gains or (losses). Attach Form 4797	**4**	
5	Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E	**5**	
6	Farm income or (loss). Attach Schedule F	**6**	0
7	Unemployment compensation	**7**	20,000
8	Other income. List type and amount ▶	**8**	0
9	Combine lines 1 through 8. Enter here and on Form 1040, 1040-SR, or 1040-NR, line 8	**9**	20,000

Part II Adjustments to Income

10	Educator expenses	**10**	0
11	Certain business expenses of reservists, performing artists, and fee-basis government officials. Attach Form 2106	**11**	0
12	Health savings account deduction. Attach Form 8889	**12**	0
13	Moving expenses for members of the Armed Forces. Attach Form 3903	**13**	0
14	Deductible part of self-employment tax. Attach Schedule SE	**14**	0
15	Self-employed SEP, SIMPLE, and qualified plans	**15**	0
16	Self-employed health insurance deduction	**16**	
17	Penalty on early withdrawal of savings	**17**	0
18a	Alimony paid	**18a**	
b	Recipient's SSN ▶		
c	Date of original divorce or separation agreement (see instructions) ▶		
19	IRA deduction	**19**	0
20	Student loan interest deduction	**20**	
21	Tuition and fees deduction. Attach Form 8917	**21**	
22	Add lines 10 through 21. These are your **adjustments to income.** Enter here and on Form 1040, 1040-SR, or 1040-NR, line 10a	**22**	0

2020 **Form 1040- V**

Department of the Treasury
Internal Revenue Service

▼ **Detach Here and Mail With Your Payment and Return** ▼

Form **1040-V**
Department of the Treasury
Internal Revenue Service (99)

Payment Voucher

► **Do not staple or attach this voucher to your payment or return.**

OMB No. 1545-0074

2020

Use this voucher when making a payment with Form 1040 or 1040SR. Write your social security number (SSN) on your check or money order.

Amount you are paying by check or money order.
Make your check or money order payable to
"United States Treasury"

Dollars
23,893

048-99-9999 049-99-9999

AMY ADAMS
JOHN ADAMS

KIA 1017

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