



NEW CLIENT INFO

Use the tax checklist below to prepare the documents you will need to bring or send us.

PERSONAL INFORMATION:

If you are a new client, last year's tax return is helpful.

The following information should be included on your Client Information Sheet:

- **Social security number or Individual Tax Identification Number for each person on the tax return including dependents.**
- **Driver's license number, issue date, expiration date, and state for primary taxpayer (and spouse if applicable)**
- **Birth date of each person on the tax return including dependents.**
- **Address**
- **Phone Number**
- **Email address**

STATEMENTS OF INCOME:

1. W2
2. 1099-M (See [Business Income and Expense Worksheet](#) to record self-employment income and expenses)
3. 1099-DIV and 1099-INT
4. 1099-G (unemployment)
5. 1099-SSA or 1099-RRB (Social Security or Railroad retirement)
6. 1099-R – (Retirement)
7. 1099-B (Income from sale of stock or other property. Include all statements from investment companies such as Edward Jones, etc.)
8. W2G (Gambling Income)
9. K-1

OTHER INCOME /EXPENSE

Farm Income (See [Farm Income and Expense Worksheet](#) to record farm or ranch income and expenses)

Rental income and expenses

ASSETS

Rental or business asset information if purchased in tax year or not included on prior year's taxes – date placed in service, total sale price.



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ITEMIZED DEDUCTIONS (Deductions are limited to the amount that exceeds your standard deduction)

- 1098 – Mortgage Interest
- Property taxes
- Medical expenses and mileage (deduction has additional limitation to the amount that exceeds 7.5% of your adjusted gross income)
- Charitable Contributions – cash and non-cash – and mileage

CHILDCARE AND TUITION EXPENSES

- Childcare provider annual statement or total payments made to provider and the EIN number
- 109-T from educational institution plus direct classroom expenses paid out of pocket.
- 1098-E – student loan interest paid

MISCELLANEOUS

- 1095-A health insurance form from the Marketplace