J.W. HOPP & ASSOCIATES
BUSINESS & RANCH TAX SPECIALISTS
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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