THE Hopkins GROUP

2018 CHECKLIST

FOR INDIVIDUAL TAX PREPARATION

CONTACT INFORMATION

ADDRESS, PHONE, EMAIL - For you and spouse

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BIRTHDATES - For you and all family members claimed on the return, if this is your 1st year with THG

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INCOME

YES	N/A	
☐	☐	**W-2S AND 1099-MISCS** - reporting earnings
☐	☐	**1099-INTS AND 1099-DIVS** - reporting interest, dividends and capital gains, 1099-Rs - reporting pension distributions or rollovers.
☐	☐	**FORMS 1099-B AND BASIS INFORMATION** - for stocks sold if not reported on broker statement. Additional asset sale information, if applicable.
☐	☐	**K-1S** - from partnerships and s-corporations if not prepared by The Hopkins Group
☐	☐	**SCHEDULE C FILERS** - income and expense summary or Quickbooks generated profit and loss summary and balance sheet
☐	☐	**RENTAL PROPERTIES** - Income & expense summary
☐	☐	**REAL ESTATE TRANSACTIONS** - settlement statements

ADJUSTMENTS TO INCOME

YES	N/A	
☐	☐	**SELF-EMPLOYED?**- out of pocket health insurance premiums paid plus long-term care insurance premiums, separated by individual
☐	☐	**IRA CONTRIBUTIONS**- to a qualified plan

DEDUCTIONS

YES	N/A	
☐	☐	**MORTGAGE STATEMENTS (FORM 1098)** - for owned real estate
☐	☐	**REAL ESTATE TAX BILLS** - if paid separately from mortgage or not reported on Form 1098
☐	☐	**PERSONAL PROPERTY** - tax bills
☐	☐	**HEALTH INSURANCE** – Did you have coverage for the entire year? If you received a Form 1095, please provide a copy.
☐	☐	**DONATIONS** - summary broken down by cash/noncash. If noncash donations exceed $500, provide date(s) of gifts, donee, general list of items, estimated original cost and current fair market value

TAXES

YES	N/A	
☐	☐	**FEDERAL AND STATE INCOME TAX RETURNS** copies of last year's returns if not prepared by The Hopkins Group
☐	☐	**ESTIMATED TAXES –** amount paid and dates of payment- if paid separately from mortgage or not reported on Form 1098
☐	☐	**CURRENT YEAR EXTENSIONS** - copies if not filed by The Hopkins Group

TAX CREDIT + OTHER

YES	N/A	
☐	☐	**FOREIGN BANK ACCOUNTS** or signatory over foreign accounts? *(Required question)*
☐	☐	**TRUST DOCUMENTS** - for family trusts
☐	☐	**CHILDCARE** - costs for children under age 14 plus name, address and tax ID number of provider. If nanny tax is due, include a copy of the Form W-2 and amount paid in state unemployment tax
☐	☐	**EDUCATION FUNDS (529 PLANS)** - amounts contributed for your family members during the year and tuition statements or student loan interest paid