

CONTACT INFORMATION

ADDRESS, PHONE, EMAIL - For you and spouse

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

INCOME

- | YES | N/A | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | W-2s AND 1099-MISCs - reporting earnings |
| <input type="checkbox"/> | <input type="checkbox"/> | 1099-INTs AND 1099-DIVs - reporting interest, dividends and capital gains, 1099-Rs - reporting pension distributions or rollovers. |
| <input type="checkbox"/> | <input type="checkbox"/> | FORMS 1099-B AND BASIS INFORMATION - for stocks sold if not reported on broker statement. Additional asset sale information, if applicable. |
| <input type="checkbox"/> | <input type="checkbox"/> | K-1s - from partnerships and s-corporations if not prepared by The Hopkins Group |
| <input type="checkbox"/> | <input type="checkbox"/> | SCHEDULE C FILERS - income and expense summary or Quickbooks generated profit and loss summary and balance sheet |
| <input type="checkbox"/> | <input type="checkbox"/> | RENTAL PROPERTIES - Income & expense summary |
| <input type="checkbox"/> | <input type="checkbox"/> | REAL ESTATE TRANSACTIONS - settlement statements |
| <input type="checkbox"/> | <input type="checkbox"/> | COVID-19 RELIEF - PPP, EIDL, Grants |

ADJUSTMENTS TO INCOME

- | YES | N/A | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | SELF-EMPLOYED? - out of pocket health insurance premiums paid plus long-term care insurance premiums, separated by individual |
| <input type="checkbox"/> | <input type="checkbox"/> | IRA CONTRIBUTIONS - to a qualified plan |

DEDUCTIONS

- | YES | N/A | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | MORTGAGE STATEMENTS (FORM 1098) - for owned real estate |
| <input type="checkbox"/> | <input type="checkbox"/> | REAL ESTATE TAX BILLS - if paid separately from mortgage or not reported on Form 1098 |
| <input type="checkbox"/> | <input type="checkbox"/> | PERSONAL PROPERTY - tax bills |
| <input type="checkbox"/> | <input type="checkbox"/> | HEALTH INSURANCE - Did you have coverage for the entire year? If you received a Form 1095, please provide a copy. |
| <input type="checkbox"/> | <input type="checkbox"/> | 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 | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | FEDERAL AND STATE INCOME TAX RETURNS - copies of last year's returns if not prepared by The Hopkins Group |
| <input type="checkbox"/> | <input type="checkbox"/> | ESTIMATED TAXES - amount paid and dates of payment- if paid separately from mortgage or not reported on Form 1098 |
| <input type="checkbox"/> | <input type="checkbox"/> | CURRENT YEAR EXTENSIONS - copies if not filed by The Hopkins Group |

TAX CREDIT + OTHER

- | YES | N/A | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | FOREIGN BANK ACCOUNTS or signatory over foreign accounts? <i>(Required question)</i> |
| <input type="checkbox"/> | <input type="checkbox"/> | VIRTUAL CURRENCY - Bitcoin and other Foreign Currency Transactions |
| <input type="checkbox"/> | <input type="checkbox"/> | TRUST DOCUMENTS - for family trusts |
| <input type="checkbox"/> | <input type="checkbox"/> | 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 |
| <input type="checkbox"/> | <input type="checkbox"/> | EDUCATION FUNDS (529 PLANS) - amounts contributed for your family members during the year and tuition statements or student loan interest paid |