CHECKLIST OF ITEMS TO GIVE TO SABADOS PERRY & COMPANY

N/A	YES	GENERAL
☐	☐	Please Sign Engagement Letter and Return To Us With Your Tax Information
☐	☐	Any Changes in Address, Dependents (New Births), Marital Status? (Please Give Detail)
☐	☐	Do You Want Direct Deposit of Your Refund? (Need Bank Information - **See Enclosed**)
☐	☐	Please Fill Out Enclosed ACA-Health Coverage Information **(MANDATORY BY IRS)**
☐	☐	Did You Make Gifts of More Than $15,000 To Any Individual?
☐	☐	Do You Want to Designate $3 to the Presidential Election Campaign Fund?
☐	☐	Did You Receive Any Correspondence (Notices) From IRS, State or City During 2018? (Please Include)
☐	☐	Do You Have Foreign Financial Accounts Worth Over $50,000 (Single) or $100,000 (Joint)?
☐	☐	Do You Expect Any Significant Changes to Your Tax Situation in 2019? (Please Give Detail)
		Those with businesses (Schedule C) and/or rental properties (Schedule E) must answer:
☐	☐	Did you make any payments in 2018 that would require you to file Form(s) 1099? (Over $600.00 to individuals)
☐	☐	If 'Yes', did you or will you file all required Form(s) 1099? (Note: IRS penalty is $250.00 per form for noncompliance) We can prepare these forms for you.

CONTACT INFORMATION

Telephone Numbers:	Fax Numbers:
Email Addresses:	

N/A	YES	INCOME
☐	☐	**W-2** Wage & Tax Statement (Including Children's)
☐	☐	**W-2G** Gambling Winnings
☐	☐	**1099-INT** Interest Income
☐	☐	**1099-DIV** Dividend Income
☐	☐	**1099-A** Acquisition or Abandonment of Secured Property
☐	☐	**1099-B** Proceeds From Broker & Barter Transactions (e.g. Stock Sales)
☐	☐	**1099-C** Cancellation of Debt
☐	☐	**1099-S** Proceeds From Real Estate Transactions
☐	☐	**1099-R** Pension, Annuity IRA Distributions-Please Tell Us If You Rolled Over Any Of Your Distributions or Made a Qualified Charitable Distribution (QCD)
☐	☐	**1099-G** Government Payments (State & Local Tax Refunds/Credits)
☐	☐	**1099-MISC** Miscellaneous Income (e.g. Rents, Non-Employee Compensation)
☐	☐	**1099-MSA** Archer Medical Savings Account Distributions/**1099-SA** MSA Distrbution
☐	☐	**1099-LTC** Long-Term Care Benefits
☐	☐	**K-1 (1065)** Partner's Share of Income, Credits, Deductions, Etc.
☐	☐	**K-1 (1120S)** Shareholder's Share of Income, Credits, Deductions, Etc.
☐	☐	**SSA Form -** Social Security Benefits
☐	☐	Self-Employed Income and Expense Information
☐	☐	Rental Property Income and Expense Information
☐	☐	Alimony Received
☐	☐	Unemployment Compensation Received
☐	☐	Income From Tips Not On W-2
☐	☐	Tax-Exempt Interest Income Received
☐	☐	Conversion of Regular IRA To Roth IRA

N/A	YES	ADJUSTMENTS
☐	☐	**1098-E** Student Loan Interest
☐	☐	**5498-SA** Health Savings Account or Archer Medical Savings Account Contributions
☐	☐	Regular IRA Contributions
☐	☐	Roth IRA Contributions
☐	☐	Self-Employed Health Insurance Paid (Including Medicare/Supplemental Premiums)
☐	☐	Self-Employed SEP/SIMPLE/SOLO 401(K) Contributions
☐	☐	Alimony Paid
☐	☐	Moving Expenses - U.S. Armed Forces on Active Duty Only
☐	☐	Educator Expenses

N/A	YES	ITEMIZED DEDUCTIONS
☐	☐	**1098** Mortgage Interest (Limited to Debt of $750,000)
☐	☐	Home Equity Loan Interest (Only Deductibe if Used to Build, Buy or Improve the Home Securing the Loan)
☐	☐	Mortgage Interest Not on Form 1098 (Paid to Individual)
☐	☐	Points Paid to Refinance Home in 2018 (+ Need Number of Years on New Mortgage)
☐	☐	PMI Mortgage Insurance Premiums Paid
☐	☐	Investment Interest Paid
☐	☐	Real Estate Taxes Paid
☐	☐	State Income Taxes Paid: 2017 Balance + 2018 Estimates
☐	☐	State Sales Taxes Paid on Big Ticket Items (Vehicles, Boats, Aircraft)
☐	☐	City Taxes Paid: 2017 Balance + 2018 Estimates
☐	☐	Charitable Contributions Paid By Cash & Check (**MUST** have receipts for all cash donations)
☐	☐	Charitable Contributions - NonCash
☐	☐	1098-C Contributions of Motor Vehicles, Boats & Airplanes
☐	☐	Medical Expenses (If Exceed 7.5% of Adjusted Gross Income)**

N/A	YES	OTHER
☐	☐	**Forms 1095 A, B or C Health Insurance Coverage (MANDATORY!!)**
☐	☐	**1098-T** Tuition Payments (American Opportunity/Lifetime Learning Credit)
☐	☐	Child & Dependent Care Credit (Day Care)
☐	☐	**Drivers License** - If You Renewed Yours in 2018 We Will Need a Copy
☐	☐	Federal Income Tax Estimates Paid
☐	☐	Residential Energy Credit (10% of qualifying improvements up to $500 lifetime)

N/A	YES	OHIO
☐	☐	**Ohio Use Tax to Report** (For Out-of-State & Internet Purchases) **(MANDATORY!!)**
☐	☐	College Savings Plan Contributions
☐	☐	Do you want to designate $1 to the Ohio Political Party Fund?
☐	☐	Do you want to donate part of your refund? (We will contact you for specifics)

*Good Used Condition or Better. Use "Thrift Value". **MUST Have Receipts for All Noncash Donations.**

**If You Give Us A Written Summary Of Medical Expenses, Please Keep Your Individual Medical Receipts At Home.