BROWN & BROWN CPAs, LLC

Tax • Accounting • Bookkeeping

2022 Client Checklist

New clients: Copy of 2021 tax return ☐

All clients: Copy of driver's license ☐ Taxpayer ☐ Spouse
or issue date of license if same ________ ________

New clients and **updates** for returning clients:

Taxpayer ______________________ DOB ________ SS# ____________ Occupation __________

Spouse ______________________ DOB ________ SS# ____________ Occupation __________

Address ______________________ Phone ________ Email ______________________

Dependent #1 ______________________ DOB ________ SS# ____________ Relationship __________

Dependent #2 ______________________ DOB ________ SS# ____________ Relationship __________

Dependent #3 ______________________ DOB ________ SS# ____________ Relationship __________

Direct deposit: Bank ______________________ Checking ☐ Savings ☐ Other ____________

Routing # (9 digit) ____________ Account # ____________ (Returning client- if same as last yr, enter last 4 of acct only)

☐ B&B to help resolve city tax withholding issues for remote work vs. principal place of work (billed separately)

Answer Yes or No & provide support for every Yes answer:

Yes	No	Qty	**Income Items**
☐	☐	☐	W-2
☐	☐	☐	Unemployment compensation- 1099-G
☐	☐	☐	Social Security income- SSA-1099
☐	☐	☐	Pension, IRA, annuity, etc distribution-1099-R
			☐ Roth conversion ☐ Rollover ☐ Repay CVirus Distr
☐	☐	☐	Interest income- 1099-INT
☐	☐	☐	Dividend income- 1099-DIV
☐	☐	☐	Investments sold- 1099-B; Home Sold- 1099-S
☐	☐	☐	2021 Tax refunds: state, city, or school- 1099-G
☐	☐	☐	Partnership/S-Corp- K-1
☐	☐	☐	Trust/ Estate- K-1
☐	☐	☐	Other: Royalty, Pre '19 alimony, Forgiven debt, Rental of personal property, Non W-2 tips, Prizes/awards, Jury duty, Gambling winnings, Foreign income or bank acct.
☐	☐	☐	Digital assets- receive, sell, exchange, gift, dispose
			Business, Farm & Rental
☐	☐	☐	Sole Proprietor- income & expenses**
☐	☐	☐	Rental property- income & expenses**
☐	☐	☐	Farm- income & expenses**
☐	☐	☐	- Mileage- split b/w 1/1/22-6/30/22 & 7/1/22-12/31/22 (business, commute, personal; make, model & yr.)**
☐	☐	☐	- Home office expenses** (N/A for W-2 employees)
☐	☐	☐	- Asset purchases or sales**
☐	☐	☐	- Employee Retention Credit received in 2020-2023

Client Notes:

Yes	No	**Adjustments, Deductions, Credits, & Other Items**
☐	☐	Estimated tax payments for 2022**
☐	☐	IRA (nonwork retire.) contribution made or to make
☐	☐	Roth IRA (nonwork retire.) contribution made or to make
☐	☐	Self-employed retirement (SEP, Simple, 401k)
☐	☐	Self-employed health insurance premium $______
☐	☐	Student loan interest paid- 1098-E
☐	☐	Teacher unreimbursed classroom exp $_____ ($300 max)
☐	☐	Medical expenses not paid by insurance, HSA, or reimbursement, if significant (>7.5% AGI)**
☐	☐	Home mortgage interest- 1098
☐	☐	Real estate taxes paid; list if not on 1098 $______
☐	☐	Charity- summarize cash/check/credit** $______
☐	☐	- Donation from IRA to charity (including RMDs)
☐	☐	Charity (noncash)- FMV of donation** ($______ <$500)
☐	☐	- Appreciated stock donation
☐	☐	Household employee- Sch H, W-2, taxes paid
☐	☐	HSA contributions- 5498-SA, W2 or summary
☐	☐	HSA distributions- 1099-SA ☐ Check if qual. medical
☐	☐	Child care expenses- list by provider (EIN/SS#) & child
☐	☐	College tuition and fees- 1098-T from Univ., etc
☐	☐	Electric vehicle purchase- purchase agreement
☐	☐	Home energy eff imprv (wndws/drs, A/C, furn, solar, etc)
☐	☐	529 contributions/distributions by beneficiary
☐	☐	Refinance or buy a new home- closing statement
☐	☐	Other: Pre '19 alimony, Long-term care insurance, Gambling losses, OH use tax, OH campaign contribution, OH Donation to Scholarship Grant Org.
☐	☐	Healthcare.gov marketplace insurance, premium tax credit- 1095-A only

** B&B Excel Templates- Increase accuracy & efficiency by summarizing these items on our templates. Download at: https://brownandbrowncpas.com/TaxPreparationServices/