BROWN & BROWN CPAs, LLC
Tax • Accounting • Bookkeeping

2021 Client Checklist & Tax Information to Provide

New clients: Copy of 2020 tax return ☐

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

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

Taxpayer Name______________________ DOB________ SS#____________ Occupation ____________

Spouse Name______________________ DOB________ SS#____________ Occupation ____________

Address ______________________ Phone__________ Email ____________________

Dependent #1 Name ______________________ DOB ________ SS#____________ Relationship ____________

Dependent #2 Name ______________________ DOB________ SS#____________ Relationship ____________

Dependent #3 Name ______________________ DOB________ SS#____________ Relationship ____________

Direct deposit: Bank name ______________________ Checking ☐ Savings ☐ Other ____________

Routing # (9 digit)__________ Account # ____________ (Returning client- 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)

All clients (please answer Yes or No & support every Yes answer):

Yes	No	Qty	**Income Items**
☐	☐	☐	W-2
☐	☐	☐	Interest income- 1099-INT
☐	☐	☐	Dividend income- 1099-DIV
☐	☐	☐	Pension, IRA, annuity, etc distribution-1099-R
			☐ Roth conversion ☐ Rollover ☐ Repay CVirus Distr
☐	☐	☐	Social Security income- SSA-1099
☐	☐	☐	Unemployment compensation- 1099-G
☐	☐	☐	2020 Tax refunds: state, city, or school- 1099-G
☐	☐	☐	Mutual funds or stocks sold- 1099-B
☐	☐	☐	Partnership/S-Corp- K-1
☐	☐	☐	Trust/ Estate- K-1
☐	☐	☐	Other: Royalty, Pre '19 alimony, Frgiven debt, Rental of personal property, Non W-2 tips, Prizes/awards, Jury duty, Gambling winnings, Foreign income or bank acct.
☐	☐	☐	Virtual/cryptocurrency-receive, sell, exchange, dispose
			Business, Farm & Rental
☐	☐	☐	Sole Proprietor- income and expenses**
☐	☐	☐	Rental property- income and expenses**
☐	☐	☐	Farm- income and expenses**
☐	☐	☐	- Covid related sick leave or family leave
☐	☐	☐	- Mileage (commuting & personal; make, model & yr.)**
☐	☐	☐	- Home office expenses** (N/A for employees)
☐	☐	☐	- Asset purchases or sales**
☐	☐	☐	- PPP/PPP2 loan received in 2021

Client Notes:

Yes	No	**Adjustments, Deductions, Credits, & Other Items**
☐	☐	Stimulus payment (EIP#3)- IRS Notice or bank detail
☐	☐	Advance child tax credit- IRS Letter 6419
☐	☐	Estimated tax payments for 2021**
☐	☐	IRA or SEP 2021 contributions made or to be made
☐	☐	Roth IRA 2021 contributions made or to be made
☐	☐	Self-employed health insurance premium
☐	☐	Student loan interest paid- 1098-E
☐	☐	Teacher unreimbursed classroom expense ($250 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 (itemizing)- summarize cash/check/credit**
☐	☐	Charity (not itemizing)- amount $_____ ($300/$600max)
☐	☐	- Donation from IRA to charity (including RMDs)
☐	☐	Charity (non-cash)- fair market value of goods donated**
☐	☐	- 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 and by child
☐	☐	College tuition and fees- 1098-T from Univ., etc
☐	☐	529 contributions/distributions by beneficiary
☐	☐	Refinance or buy a new home- closing Statement
☐	☐	Other: Pre '19 alimony, Long-term care insurance, Electric vehicle purchase, Energy efficiency improvements on home, Gambling losses, OH use tax, OH campaign contribution
☐	☐	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/