BROWN & BROWN CPAs, LLC
Tax • Accounting • Bookkeeping

2019 Client Checklist & Tax Information to Provide

New clients: Copy of 2018 tax return ☐

All clients: Copy of Driver's License ☐ Taxpayer ☐ Spouse

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)

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

Yes	No	**Income Items**
☐	☐	W-2
☐	☐	Interest income- 1099-INT
☐	☐	Dividend income- 1099-DIV
☐	☐	Pension, IRA, annuity, etc. distributions-1099-R
☐	☐	Rollover retirement or conversion to Roth-1099-R
☐	☐	Social Security income- SSA-1099
☐	☐	Unemployment compensation- 1099-G
☐	☐	2018 Tax refunds: state, city, or school- 1099-G
☐	☐	Mutual funds or stocks sold- 1099-B
☐	☐	** Business- income and expenses
☐	☐	** Rental property- income and expenses
☐	☐	** Farm- income and expenses
☐	☐	** Mileage summary split by bus., farm, or rental, commuting & personal; make, model & yr.
☐	☐	** Home office expenses
☐	☐	** Listing of asset purchases or sales for your business, farm or rental property
☐	☐	Partnership- K-1
☐	☐	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 currency- receive, sell, exchange or acquire

Client Notes:

Yes	No	**Adjustments, Deductions, Credits, & Other Items**
☐	☐	** Estimated tax payments for 2019
☐	☐	IRA or SEP contributions made for 2019
☐	☐	Roth IRA contributions made for 2019
☐	☐	Self-employed health insurance premium
☐	☐	Student loan interest paid- 1098-E
☐	☐	Teacher unreimb classroom expense ($250 max)
☐	☐	** Medical expenses not paid by insur, HSA, or reimbursement, if significant (>7.5% AGI)
☐	☐	Home mortgage interest- 1098
☐	☐	Real estate taxes paid; list if not on 1098
☐	☐	** Charity- summary of cash, check, credit card
☐	☐	** Charity- fair market value of goods donated
☐	☐	Household employee- Sch H, W-2, taxes paid
☐	☐	HSA contributions- 5498-SA, W2 or summary
☐	☐	HSA distributions (all medical?)- 1099-SA
☐	☐	Child care expenses- list by provider (address and EIN/SS#) and list by child
☐	☐	College tuition and fees- 1098-T from Univ., summary of what was paid/borrowed in 2019
☐	☐	529 contributions/distributions by beneficiary
☐	☐	Refinance or buy a new home- HUD closing State.
☐	☐	Other: Pre '19 alimony, RMD payments to charity, Long-term care insurance, Electric vehicle purchase, Energy efficiency improvements on home, Gambling losses, OH use tax, OH campaign contribution
☐	☐	Health insurance premium tax credit (marketplace insurance)- 1095-A

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