BROWN & BROWN
CPAs, LLC
Tax • Accounting • Bookkeeping

2025 Client Checklist

New clients: Copy of 2024 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 ____________
Phone_______________ Email____
Spouse ________________________________ DOB__________ SS#_______________ Occupation ____________
Phone_______________ Email____
Address ____________________________ City_____________ State____ Zip________ New ☐ Move Date__________
Dependent ______________________________ DOB__________ SS#_______________ Son ☐ Dau ☐ __________
Dependent ______________________________ DOB__________ SS#_______________ Son ☐ Dau ☐ __________
Dependent ______________________________ DOB__________ SS#_______________ Son ☐ Dau ☐ __________
Direct deposit: Bank _____________________________ Checking ☐ Savings ☐ Other______________
Routing # (9 digit)____________ Account # ____________ (Returning client & same as last yr, only last 4 of acct needed)

Yes No Qty **Income Items**

☐ ☐ ☐ W-2 ☐ Tips ☐ Overtime Pay (last pay stub)
☐ ☐ ☐ Unemployment- 1099-G
☐ ☐ ☐ Social Security- SSA-1099
☐ ☐ ☐ Pension, IRA, annuity, etc distribution-1099-R
☐ Roth conversion ☐ Rollover ☐ QCD ☐ Early Exception
☐ ☐ ☐ Interest- 1099-INT
☐ ☐ ☐ Dividends- 1099-DIV
☐ ☐ ☐ Investments sold- 1099-B; Home Sold- 1099-S
☐ ☐ ☐ State, city, or school tax refunds- 1099-G
☐ ☐ ☐ Gambling winnings-W-2G
☐ ☐ ☐ Partnership/ S-Corp/ Trust/ Estate- K-1
☐ ☐ ☐ Other: Royalty, Pre '19 alimony, Forgiven debt, Rental of personal property, Non W-2 tips, Prizes/awards, Jury duty, 1099-K, Foreign income or bank acct.

☐ ☐ ☐ Digital assets- receive, sell, exchange, gift, dispose

Business, Farm & Rental

☐ ☐ ☐ Sole Proprietor- income & expenses** ☐ Tips
☐ ☐ ☐ Rental property- income & expenses** ☐ <7day avg
☐ ☐ ☐ Farm- income & expenses**
☐ ☐ ☐ - Mileage- (business, commute, personal; make, model & yr.)** (N/A for W-2 employees)

☐ ☐ ☐ - Home office expenses** (N/A for W-2 employees)
☐ ☐ ☐ - Asset purchases or sales**(date, amount, description)

Client Notes:

Yes No **Adjustments, Deductions, Credits, & Other Items**

☐ ☐ Estimated tax payments for 2025**
☐ ☐ IRA (non W-2 retire.) contribution made or to make
☐ ☐ Roth IRA (non W-2 retire.) contribution made or to make
☐ ☐ Self-employed retire. (SEP, Simple, 401k) made or to make
☐ ☐ 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 (limited if mort. > $750k)
☐ ☐ Real estate taxes paid; list if not on 1098 $_________
☐ ☐ Charity- summarize cash/check/credit** $_________
☐ ☐ Charity (noncash)- FMV of donation** ($______if <$500)
☐ ☐ Appreciated stock donation or donor advised fund contr.
☐ ☐ Interest on new vehicle in '25, n/a MAGI > s150k/m250k
☐ ☐ 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 (by 9/30/25)- dealer credit/info report
☐ ☐ Home energy eff imprv (wndws/drs, A/C, furn, solar, etc)
☐ ☐ 529 contributions by beneficiary/distributions (1099-Q)
☐ ☐ 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., Gifts made > $19k

☐ ☐ 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/

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