BROWN & BROWN CPAs, LLC
Tax • Accounting • Bookkeeping

2024 Client Checklist

New clients: Copy of 2023 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
☐	☐	☐	Unemployment- 1099-G
☐	☐	☐	Social Security- SSA-1099
☐	☐	☐	Pension, IRA, annuity, etc distribution-1099-R
			☐ Roth conversion ☐ Rollover ☐ 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**
☐	☐	☐	Rental property- income & expenses**
☐	☐	☐	Farm- income & expenses**
☐	☐	☐	- Mileage- (business, commute, personal; make, model & yr.)**
☐	☐	☐	- Home office expenses** (N/A for W-2 employees)
☐	☐	☐	- Asset purchases or sales**
☐	☐	☐	- Employee Retention Credit received in 2020-2024

Client Notes:

Yes	No	Adjustments, Deductions, Credits, & Other Items
☐	☐	Estimated tax payments for 2024**
☐	☐	IRA (nonwork retire.) contribution made or to make
☐	☐	Roth IRA (nonwork 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
☐	☐	Real estate taxes paid; list if not on 1098 $______
☐	☐	Charity- summarize cash/check/credit** $______
☐	☐	- QCD: Donation from IRA (>70 1/2, can count as RMD)
☐	☐	Charity (noncash)- FMV of donation** ($______if <$500)
☐	☐	Appreciated stock donation or donor advised fund contr.
☐	☐	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 (new or used)- 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 > $18k
☐	☐	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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