

Appointment Date

FILLING THIS OUT - HELPS US HELP YOU.

BROWN, BROWN AND ASSOCIATES, P.C.

Certified Public Accountants

Thank you for your referrals.

Appointment Time

TAX ORGANIZER for 2021

CLARKSVILLE
309 Poston Street
Clarksville, TN 37040 USA
Phone 931-647-2486
Fax 931-552-3284

SPRINGFIELD
728 South Main
Springfield, TN 37172 USA
Phone 615-384-8431
Fax 615-384-7271

NASHVILLE
1321 Murfreesboro Pike, Suite 505
Nashville, TN 37217 USA
Phone 615-361-8204
Fax 615-361-9910

KNOXVILLE
10410 Jackson Oaks Way
Knoxville, TN 37922 USA
Phone 865-673-9798
Fax 865-531-3364

SEVIERVILLE
112 Parkway
Sevierville, TN 37862 USA
Phone 865-428-2824
Fax 865-428-8880

Please visit our website for employees and individual email addresses
www.brownbrowncandassociates.com

Filing Status: Single Head of Household Married - Filing Jointly Married - Filing Separately

YOUR PERSONAL INFORMATION

Name SS# Birthdate Occupation Cell #
Spouse's Name SS# Birthdate Occupation Cell #
Address
Dependents Full Name Dependents SS# Relationship Birthdate

ESTIMATED TAXES PAID

Applied from 2020 tax return \$
April 15, 2021 \$
June 15, 2021 \$
September 15, 2021 \$
January 18, 2022 \$
TOTAL \$

Have Marketplace Insurance Yes / No
Have 1095-A Yes / No
e-mail address

WAGES AND SALARIES

Please make sure all W-2s are enclosed
Employer Amount

DIVIDEND INCOME - 1099 DIV

Payor Amount

RETIREMENTS & ANNUITIES Please make sure all 1099R's are enclosed.

Payor Amount

ADVANCE CHILD TAX CREDIT - YES OR NO

Need Amounts received per child Amount

INTEREST INCOME - 1099 INT

Total
Penalty on early withdrawals

OTHER INCOME

Commissions 1099-MISC
Bonuses & Prizes
Alimony received
State Tax refund 1099 G
Unemployment Compensation
Gambling / Lottery W2G
Husband's Social Security/RR - 1099 SSA
Wife's Social Security/RR - 1099 SSA
Other (List)
Stimulus Received
K-1's Form Ptrs, S-Corp, LLC

INDIVIDUAL RETIREMENT ACCOUNT - DEDUCTIONS

Payments made for current year - Regular
Payments made for current year - Roth
Have Pension Plan? Yes No
Individual Spouse

CANCELLATION OF DEBT / 1099C

Credit Cards or Other
Mortgages

SALES OF PROPERTY, STOCK, EQUIPMENT OR TIMBER

Table with 5 columns: List below any buildings, land and/or equipment sold, 1099B/1099S, Date Purchased, Purchase Price, Date Sold, Sales Price

SCH A - DEDUCTIONS

MEDICAL

Doctors, Dentists, etc.	Mileage	Amount Paid
Total		
Total Medical Miles (.16)		

Drugs and Medications
Private Health Insurance

TAXES

	Amount Paid
State Income Tax	
Real Estate Tax	
Personal Property Tax	
Sales Tax, Vehicle, Boat, Home, Large Items	

INTEREST

	Amount Paid
Home Mortgage Interest - Financial Institutions	
Home Mortgage Interest - Individuals	
Other (List)	

CONTRIBUTIONS

	Amount Paid
Church	
Goodwill Industries	
Total	
Charitable Miles Traveled .14 per mile	
Total Contributions	

TEACHERS

Classroom Supplies

HEALTH SAVINGS ACCOUNT - 1099SA

Self	Yes	No
Family	Yes	No
Amount we contributed to	\$	
	Amount	
1099-SA		

EDUCATION CREDIT EXPENSES

	Amount Paid
Tuition Paid	
Fees Paid	
Books	
Student Loan Interest Paid	

MUST HAVE FORM 1098T - REQUIRED

VARIOUS STATES ONLY

	Amount Paid
Travel	
Employee Business	
Misc. Deductions	

OVER ROAD TRUCKERS AND OUTSIDE SALES PERSONS

Days Out

TRAVEL

Number of Business Miles Traveled
Total Miles Driven this Year
Make of Vehicle
Year Purchased

OFFICE IN HOME

Square Feet in Office

EMPLOYEE BUSINESS EXPENSE

	Amount Paid
Fares for airplane, boat, bus, taxi, etc.	
Meals & Tips	
Lodging	
Laundry	
Other (List)	
Union Dues, Doby, Assessments	
Books, Publications and Subscriptions	
Uniforms	
Total	
Amount reimbursed to you	
Grand Total	

RENTAL INCOME

Type of Property and Address (List each property separately)

Amount Collected

(a)	
(b)	
(c)	
(d)	

RENTAL EXPENSES

(a) Amount (b) (c) (d)

Advertising				
Auto & Travel				
Cleaning & Maintenance				
Commissions				
Insurance				
Legal and other professional fees				
Management fees				
Mortgage interest paid to banks				
Other interest				
Pest control				
Repairs				
Supplies				
Taxes				
Utilities				
Other (list)				
TOTAL				

CHILD CARE CREDIT

Name of Qualifying Person	Date of Birth	Relationship	Length of Time Lived with You			
		ID# or SS#	Relationship (if Any)	From	To	Paid
Person or Organization Caring for Child						
Name and Address						

Service Stations, Markets, Various Stores, Self Employed, Over Road Truckers, Hair Salons, Car Sales, etc.

Y N

SCH C / SMLLC PROFIT OR LOSS FROM BUSINESS - 1099 NEC BUSINESS INCOME AND EXPENSES

Name of Business	
Federal ID #	
BUSINESS SALES AND INCOME	Amount
Gross Receipts from Business (Money you took in)	
PPP Income/Forgiveness	
Payroll Retention Credit	
Inventory on Hand - Beginning of Year	
Merchandise Purchased for Resale	
Inventory on Hand - End of Year	

Sole Proprietor		
Single Member LLC		

BUSINESS EXPENSES (What you Paid Out) Amount

Advertising	
Car and truck expenses (Actual)	
Commissioned Fees Paid	
Insurance	
Interest mortgage (paid to banks, etc.)	
Interest - Paid to Others	
Legal, Accounting, Tax Return Prep. Fees	
Office Expenses	
Rent or Lease of Land & Buildings	
Rent Vehicles, Machinery, and Equipment	
Repairs and Maintenance	
Supplies	
Taxes and Licenses	
Travel	
Meals	
Utilities, Telephone, Cell phone	
Wages	
Payroll Taxes	
Other Expenses (List type and amount)	
TOTAL BUSINESS EXPENSES	

AUTO/TRUCK MILEAGE

EQUIPMENT PURCHASED	Amount
HEALTH INSURANCE PAID - OWNER	
HEALTH INSURANCE PAID - EMPLOYEES	

SCH F - FARM INCOME & EXPENSES

Federal ID No. (If applicable)

PRODUCE & STOCK SALES - Raised on Farm

Kind	Amount
Cattle	
Brood Cows / Bull / Animals - Sold 2 yrs or older	
Total Cattle	
Hogs	
Tobacco	
Soybeans	
Other Grains	
Patronage Dividends - 1099 PATR	
Agriculture Program Payments	
Crop Insurance Proceeds	
Custom hire (machine work) income	
Other income, including fuel tax credit or refund	
PPP Income/Forgiveness	
Payroll Retention Credit	
TOTAL	

Sale of Livestock you bought for resale

Livestock Type	Date Bought	Cost	Selling Amount
TOTAL			

EQUIPMENT PURCHASED

	Amount

BROOD STOCK PURCHASED

	Amount

QUESTIONS FOR ACCOUNTANT?

FARM EXPENSES

Amount

Car and truck expenses	
Chemicals	
Custom hire (machine work)	
Feed purchased	
Fertilizer and lime	
Freight and trucking	
Gasoline, fuel and oil	
Insurance (other than health)	
Interest Mortgage (paid to banks, etc.)	
Interest on other equip. & operating notes	
Labor hired	
Rent or lease vehicles, machinery and equip.	
Other (land, animals, etc.)	
Repairs and maintenance	
Seeds and plants purchased	
Storage and warehousing	
Supplies purchased	
Taxes	
Water, Elec. Tel. Cell Phone	
Office Exp. Postage, Supplies	
Veterinary, breeding and medicine	
Dues & Subscriptions	
Safety Deposit Box	
Legal, Accounting, Tax Prep.	
Other expenses (specify)	
TOTAL	

FARMERS FUEL TAX CREDIT

(Gas or Diesel Purchased at Service Station but used in Tractor, or off road)

Number of gallons of gasoline used _____
 Number of gallons of diesel used _____
 Number of gallons of oil used _____

QUESTIONS

INCLUSIONS

I have included with this form: (please check)

- W2's
- 1098T
- 1099's
- 1099's MISC/NEC
- 1099 K
- 1095 A
- 1095 B
- 1095 C
- Purchase & Selling agreements for real estate, stocks, etc.

NOTICE: "You are required by law to keep records that will enable you to prepare a complete and accurate Income tax return. Although the law does not require any special form of records, you must retain all receipts, cancelled checks, and other evidence to prove amounts claimed as deductions. You must keep your records for as long as their contents may be material in administering any Internal Revenue Law."

Please refer your friends and neighbors to us.

THANK YOU - WE CARE