New Client Welcome

Please complete one of our Tax Organizers to the best of your ability. We will be asking questions at the interview and the organizer may give you a heads up in what we'll be looking for.

What to bring to your interview;

Copies of your prior year's tax returns. Up to 3 prior years if you have them.

Current address, phone number, email address, Social Security numbers and dates of birth.

W-2's, 1099-R's, 1099-INT and DIV's, Year-end brokerage account statements.
Any confirmation of income for the tax year we're doing for you.

If you itemize your deductions; property tax statements, mortgage interest 1098's, proof of charitable contributions and verification of employment related expenses.

For those of you with **rental properties**, please complete the worksheet we provide in the Tax Organizer. In addition to the current information of income and expenses, we'll need a depreciation schedule for the property and the assets used for the rental(s).

Business owners, please fill in the appropriate information on our Tax Organizer. Sole proprietors generally will have a Schedule C attachment to their personal tax return. We will also need a depreciation schedule for all business assets as well as a list of new assets and assets disposed of in the year for which we are working.

If you are involved in a partnership or corporation we will need copies of the K-1's issued to you.