

What to Bring to Your Appointment

A general checklist to help you prepare. Bring what applies to your situation — if you're not sure whether something applies, bring it anyway and we'll sort it out together.

For Every Appointment

- Photo ID
- Social Security cards (or ITIN letters) for you, your spouse, and any dependents
- Prior-year tax return, if you're a new client
- Bank account and routing number, for direct deposit of any refund

Individual Tax Returns

- W-2s and 1099s for all income received during the year
- Mortgage interest and property tax statements
- Investment and brokerage account statements
- Records of major life events (marriage, divorce, new child, home purchase or sale, retirement)
- Childcare and education expense records
- Charitable contribution receipts or acknowledgment letters
- Any IRS or state tax notices received during the year

Business Tax Returns

- Bookkeeping records or financial statements for the year
- Prior-year business tax return
- EIN documentation
- Entity formation documents, if this is your first return with us
- Payroll records and forms, if you have employees
- Records of major equipment or asset purchases and sales

Non-Profit Filings

- Prior-year Form 990-series return
- IRS determination letter
- Current financial statements or trial balance
- Grant and major donation records
- Board, officer, and key-employee information

Estate & Trust Matters

- Death certificate
- Will or trust document
- The decedent's prior-year individual tax return
- Estate or trust financial records and account statements
- Schedule K-1s received, if applicable

IRS or State Tax Notices

- The notice itself
- The tax return the notice relates to
- Any correspondence you've already sent or received about the issue
- Supporting documentation the notice specifically requests

Bookkeeping Catch-Up

- Bank and credit card statements for the period needing catch-up
- Any existing bookkeeping file or software export
- Prior tax returns filed for the business
- Outstanding invoices and bills, if available

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