

Tax Planning Appointments

Preparing for Your Appointment

Please review all the applicable information below to ensure you have all of your documents at the time of your scheduled appointment. If you are missing any documentation, your appointment may need to be rescheduled for a later date.

Tax Planning Appointments

Please have the below applicable information/documents for your appointment:

- Most recent tax return filing
 - Most recent paystubs
 - Amounts and dates of any federal or state quarterly estimates paid
 - Current withholding election
 - YTD profit and loss statement for any business interests you may have
 - YTD investments earnings statements
- Any relevant household information