

## First Visit

What should you bring to your first visit?

(Business)

- Prior year return (business and personal)
- Articles of Membership/Incorporation or Partnership
- Form 2553 if filed
- Last completed financial statements if you have them
- Payroll reports (i.e. 941, UCT-6, W3 and W2s)
- Asset List with Asset description, date purchased, amount paid for asset

(Personal)

- Prior year return
- W2's, 1099s, any other original income documentation

Other items may include but are not limited to:

- Mortgage Interest
- Property Taxes
- Charitable gifts (cash and noncash)
- Rental Property Information (income and expenses)
- Dependent information ( name, social security number)
- Child care expense
- Stock transactions (1099B and cost basis)
- Business Income and Expenses

If you have any questions on what to bring please feel free to call.