



## What should I bring to my first appointment? (Checklist)

We prioritize efficiency in everything we do, and that includes getting the most out of any time we have together. Our handy First Appointment Checklists ensure you'll arrive at your appointment with everything we're most likely to ask for.

### Tax return for Businesses

- Previous year tax return
- Operating agreement/bylaws
- Photo ID

### Tax returns for Individuals

- Previous year tax return
- Photo ID

### Trust (Fiduciary) Tax Returns

- Previous year tax return
- Copy of trust and/or will
- Copy of death certificate
- Photo ID