

What to Bring to Your Tax Appointment?

- W-2's (wages, etc.)
- 1099's (interest, dividends, etc.)
- Schedule K-1's from Partnerships, S-Corporations, etc.
- Brokerage Statements
- Sales of Stock
- Business Income and Expenses
- IRA/Pensions Distributions
- Real Estate Taxes/Home Mortgage Interest
- Charitable Contributions
- Social Security Number for You and All Dependents
- Prior Year Tax Return
- The below coupon for a New Client Discount

Bring in this coupon for a
15% New Client Discount.

*Call today to schedule your
free consultation!*

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