



PERSONAL SOLUTIONS
TAX SERVICES

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Checklist of things to bring for your first appointment
2022 Tax Return
(or arrive 10 minutes early to complete paperwork)

- New Client Questionnaire (completed)
- 1040 Tax Organizer (completed)
- 2021 tax returns (prior year federal, state, school district, and local returns)
- Any government correspondence
- All forms received that say important tax information
- If you own a business or rental, depreciation schedules (regular and AMT) from 2021

Tax Preparer Signature

Date