



F.A.Q. for new clients

Q. What should I bring to my first appointment?

A. All tax support, any notices from IRS, last two (2) years tax returns, any contact information for all parties effected (phone numbers, email addresses, physical and mailing address).

Q. Do I have to fill out the tax organizer?

A. Yes. The tax organizer will give your accountant a snap shot of your fiscal year. It leads them through all of the documents that are necessary for a complete and thorough tax return. Your tax return will be much more complete and accurate by completing this. You can help lower the costs of your return by doing a few simple things:

- Carefully complete the tax organizer
- Keep documents in the order laid out in the tax organizer
- Remove all staples from ALL documents in your tax organizer
- Open all mail
- Complete the tax organizer online (doing it this way is safe and secure. It is compatible with our software, taking away the data entry aspect and therefore lowering your costs).

If you have any questions while completing your tax organizer, please contact our office.

Q. How to pay taxes online?

A. Go to www.irs.gov/payments and follow the instructions listed.