CPA ADVISORY GROUP
A PINNACLE CPA ADVISORY GROUP MEMBER
Leading Small Business and Individuals to Success
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TAX TAMER SIMPLE STARTER PAGE

There are only a few questions to get started. Please bring the requested information to our meeting so we can start saving you money and giving you great tax and financial planning ideas.

Full Name: **Taxpayer:** ______________________________ **DOB:** ______/_____/______

Spouse: ______________________________ **DOB:** ______/_____/______

Occupation: **Taxpayer:** __________________________ **Spouse:** __________________________

Phone #: **Taxpayer:** (____)________ **Spouse:** (_____)__________ **E-Mail:** ______________________

Entity Names and Types: ____

Married? No Yes Date: __________ **Divorced? No Yes Date:** ________ **Widowed? No Yes Date:** ________

Children & DOB: ____

Other Dependents & DOB: ____

Here is what you need to have for our first meeting (if available):

Personal Information:

- **Tax Returns (3 most recent income tax returns filed with the IRS, state and local governments)**
- **Net Worth Statement (a list of what you own and what you owe)**
- **Budget Statement (a list of sources of income and expenses on a monthly or annual basis)**
- **Most recent month end statements for all significant investments**
- **Health, life, disability and long term care insurance policies separated by taxpayer and spouse**
- **Pay Stubs (most recent one in current year)**
- **Will, trusts, divorce decrees, separation agreements and pre or post-nuptial agreements**

Business Information:

- **Business Tax Returns (3 most recent if different than the personal returns mentioned above)**
- **Payroll Tax Returns (most recent list of each employee and wages paid – W-2's would be great)**
- **Balance Sheet (most recent list of what the business owns and owes)**
- **Income Statement (most recent list of what the business had in sales and expenses)**
- **Buy/sell agreements and succession plan**

Prepared By: ____ **Date:** ________________