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Checklist of things to bring for your first appointment 2022 Tax Return

(or arrive 15 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