



**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