

Basics: Things you need to bring to your appointment

- Completed Tax Organizer or Profit & Loss Statement
- Balance Sheet that lists new assets acquired for current year
- W-2 Wage & Earning Statements from employer(s)
- All 1099's that were issued to you from banks, businesses or investment groups (self employed income, interest, dividends, unemployment, and sale of stocks, bonds, land, and equipment)
- If you have sold stocks/bonds in the past tax year, we need date purchased and what it cost you at the time of purchase.
- If you are a new client, please bring your three (3) previous years taxes (Fed 1040 & State 1040-ME)

Please call your financial lender and obtain the amount you paid for interest on all your loans (auto, business, home, etc.)