

TAX PREP SERVICES APPOINTMENT FORM

Appointment Date:

Appointment Time:

Client Information			
First Name	Last Name	Business Name	
Phone Number	Email Address	Contact Preference	
Street Address	City	State	Zip Code

Appointment Details	
What tax year do you need services for?	Do you have copies or access to all your forms?
Do you have any extenuating circumstances?	
What is the purpose of the appointment?	

Consultation Agenda will include the following:

- Discussion of Tax Documentation: Please bring all necessary tax documents, including but not limited to W-2 forms, 1099 forms, receipts for deductible expenses, and any other relevant financial records.
- Review of Income Sources: We will review all sources of income for accurate reporting.
- Deductions and Credits: We will explore potential deductions and credits to minimize tax liability.
- Filing Options: Discussing whether to file jointly, separately, or other filing options depending on your circumstances.
- Questions and Concerns: Feel free to ask any questions or raise any concerns you may have regarding your tax situation.

Please arrive 10 minutes before the scheduled appointment time to ensure we can start promptly. If you are unable to keep this appointment, kindly notify us at least 24 hours in advance.

Our goal is to provide you with thorough and accurate tax preparation services to ensure compliance with tax laws while maximizing your eligible refunds or minimizing any tax owed.

Signature:

Signature Date: