



480.354.1040

1810 S. Crismon Rd., Ste. 188  
Mesa, Arizona 85209

### **My Tax Appointment**

What do I need to bring?

- A copy of your prior 2 year tax returns, if not prepared by this office
- Form(s) W-2's (wages, etc.)
- Form(s) 1099 (interest, dividends, etc.)
- Schedule(s) K-1 (income/loss from partnerships, S corporations, etc.)
- Form(s) 1098 (mortgage interest) and property tax statements
- Investments statements from stock, bond or other investment transactions
- Closing statements pertaining to real estate transactions
- All other supporting documents (schedules, checkbooks, etc.)
- Any tax notices received from the IRS or other taxing authorities

If not on file with us already:

A picture ID and your social security card.