Preparing for Your Tax Appointment

Step 1: Late December/early January
☐ Contact your tax preparer to schedule an appointment.

Step 2: February
☐ Gather any tax-related documentation.
☐ Sort documents by type and date (if applicable).
☐ Place documents in labeled folders.
☐ Review the tax record checklist to ensure you have all the necessary documents in your possession.
☐ Confirm with your tax preparer that no additional documents are needed to prepare your return.

Step 3: Late February/ early March
☐ Submit documents to your provider via the preferred medium.
☐ Follow up with your tax preparer to ensure they have received your documents.
☐ Pay attention to incoming mail in case any important tax documents arrive after January 31st.