

# APPOINTMENT DETAILS

You can schedule Online at [mytaxexpertinc.com](http://mytaxexpertinc.com) or call 801-849-9699

Date: \_\_\_\_\_ Time: \_\_\_\_\_

## Important Changes for this year

Don't forget to fill out the online engagement letters for business and personal  
Married Filing Separate returns are no longer free. The 2nd return (split return) is \$50  
Audit Protection and Tax Tracking now available

## Important Tax Documents

W-2's	Donation Statements	1095 A B C
1098 INT T	Daycare Statement	Retirement Contributions
1099 Int Div Misc R C G	Mortgage Interest/Property Tax	Alimony paid/received
Social Security Statement	K-1 from business	Total Medical Costs
HSA Documents	Rental Property Income/Expenses	Moving Expenses

## Other Documents if there was a change during the tax year

Divorce Decree	Marriage license	HUD Statement from a refinanced loan
HUD Statement from a new loan		Previous Years Tax Return (unless I did it)

## Personal Documents needed

Picture of each Driver's License	Social Security Cards
Medical or School record to show where the dependent lived	Birthdays

## Business Documents Needed

Profit & Loss Statement or Categorized Expense Totals	Balance Sheet	Trade Income	
Sales Tax Paid Forms	1099's Received	1099/1096 Issued	W-2/W-3 Issued
Previous Years Tax Return including depreciation schedule (unless I did it)	Retirement Contributions		

## Other Info you are including or questions you have

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