First Meeting Checklist

Please bring the following information to our first meeting:

- The most recently filed tax return (Federal and State)
- Current year-end income statement and balance sheet
- If you are using QuickBooks – a current backup of your data
- Current copy of your paycheck
- List of the estimated payments made year to date to both the IRS and the Arizona Department of Revenue
- Payroll reports for all lapsed quarters
- List of any loans made to business
- Credit card statements – if used for business
- Year-to-date sales tax reports
- Client Information Form
- Articles of Incorporation or Organization
- If a LLC or Partnership – operating agreement.