



Kerry Thompson & Co., PS

Your Tax, business consulting, and IRS representation specialist

What to bring to your first meeting with our firm:

1. Copies of your three most recent year's tax returns. For example, if the first year we will prepare your tax return is 2017, we would like copies of your 2016, 2015, and 2014 tax returns.
2. All tax documents for the current year, such as Forms W-2, 1099, 1098, and 5498. These will often arrive in an envelope labeled "Important Tax Documents Enclosed"
3. Any correspondence you have received from the IRS in the last twelve months.
4. The most recent financial statements from your business (if applicable).
5. Any legal documents regarding inheritances, judgments, settlement awards, or pending litigation filed within the last 12 months.