How to prepare for your tax appointment

1. Gather all your tax documents that came in the mail:
   - W-2 Wage statements
   - 1099 Interest, Retirement, and Miscellaneous Income statements
   - 1098 Mortgage statement
   - Social Security statements
   - Alaska PFD statements
   - Brokerage statements
   - K-1 investment statements,
   - Charity donation letters (church and non-profits)
2. Gather itemized deductions that belong in your tax return (remember that they need to exceed the standard deduction $12,900 per person)
   - Receipts for donations
   - Receipts for medical expenses
   - property tax statements, etc.
   - Mortgage interest
3. Gather business (Schedule C) income and expense documents (if appropriate)
   - Quickbooks file if you maintain your accounting on Quickbooks
     - Or Spreadsheet of expenses
   - Property and equipment purchases and disposals
   - 1099's received
4. Gather rental (Schedule E) income and expense documents.
   - Quickbooks or Excel accounting records
     - Or manual recording of expenses (by property)
5. Review your last year's return for any changes
6. Fill out the organizer; make a list of any questions
7. Sign the organizer and the engagement letter.
8. Call if you need to change your appointment time
9. Use the link to Zoom at the time of your appointment