

ADAM S. KAZAN, CPA

Initial Tax Consult Information

Please bring original hard copies of all tax correspondence and tax notices, recent investment statements, your retirement statements and any other documents used to prepare your Federal, State, and Local tax returns, such as W2, 1009.

Please bring debt statements, retirement statement, and other bank statements indicating where you have your money.

Please also bring with you:

- 2014 Federal Tax return
- 2014 State Tax return
- 2014 Local Tax return
- 2012 Federal, State, and Local tax returns and supporting documents
- 2013 Federal, State, and Local tax returns and supporting documents

This initial tax consultation will look for opportunities to amend your taxes and for compliance issues that may need to be taken care of. If adjustments are found, fees for those services will be discussed.

This consultation will also include a financial survey to help advise financial planning and tax preparation opportunities.

Additional information and documents may be requested. All of your original documents will be mailed back to you as 2014 tax returns will be entered into our computer.

The meetings are scheduled for 0.7 – 1.5 hours and are billed at 0.25 hour increments at \$200.00 per hour. Please bring a check with you to the meeting.

At the end of the meeting, you have no obligation to further engage in my services.

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