

If we have not prepared your tax returns in the past please provide the following information:

Name, address, social security number and date of birth for each person to be included on the return.

Copies of your last 2 years tax returns

Refer to the "Existing Clients Checklist" for additional information you should provide to us.

If you have any questions or concerns about what you should bring to us to prepare your taxes please call us at 517-278-2261 or email wkurtz@carlsonacctg.com.