

# Items to Bring to Your Tax Projection Appointment



■ **Instructions:** Tax planning is simplified by being prepared. At SWC, we recommend that preparation include maintaining a folder labeled “Tax Planning.” Gather and place the items below in your Tax Planning folder, making them easy to locate and either bring with you to each of your tax planning appointments or reference them when we meet. Many of the documents and items listed below may tackle in over time, which is where the Tax Planning folder becomes most useful.

## Individual Tax Planning

Copy of tax returns for the last 2 years	<i>If you are a new client and we do not already have them</i>
Most recent pay stub	<i>If you receive a W-2 which shows the year-to-date amount information.</i>
Employee stock options	<i>If applicable</i>
Investment statements	<i>Your most recent, showing year-to-date dividends and interest.</i>
Most recent Profit & Loss statement	<i>If you file Schedule C.</i>
Most recent statement of Income and Expenses	<i>If you have rental property.</i>
Copy of the escrow papers	<i>If you bought/sold a home during the year.</i>
Statement of the new principal and interest payments	<i>If you have refinanced any property.</i>
Major stock sales information	<i>If applicable.</i>
Major cash/non-cash donations	<i>If applicable.</i>
Major purchases (cars, boats)	<i>If you might be eligible for the sales tax deduction (i.e. you are retired or pay minimal state tax)</i>
Estate/Trust Planning documents	<i>Any new or revised documents.</i>

## Business Tax Planning

Tax returns for the last 2 years	<i>If you are a new client and we do not already have copies.</i>
Profit and Loss statement.	
Balance Sheet	<i>If available.</i>
Major asset purchases	
Pension plan	<i>New or revised information.</i>
Succession Plan	<i>New of revised information (e.g. Buy/Sell Agreements).</i>