TEXAS DOCUHUB | ELITE TAX STRATEGIES

Tax Appointment Checklist

A starting point for your first conversation.

Before we meet

- [ ] Write down the tax year or years you want to discuss.
- [ ] List any filing, notice, or payment deadlines you know about.
- [ ] Gather the tax records and notices already in your possession.
- [ ] Note records that are missing or that you need help locating.

Questions to bring

- [ ] What result or service are you seeking?
- [ ] Are there transactions, forms, or past filings you want explained?
- [ ] What is the best way to reach you about next steps?

Please request a secure method before sharing sensitive tax documents.

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