Client Meeting Checklist

Tax Meeting

__ All IRS and NC DOR Tax Notices and Letters
__ Copies of last 2 years tax returns (personal and/or business), if applicable.
__ If your tax issue relates to a business, bring incorporation documents, current profit/loss statement, current balance sheet and its EIN number, if applicable.

Estate Planning Meeting

__ Once you contact us, you will be provided a link to complete an Estate Planning Worksheet prior to your meeting. Please complete it to the best of your ability. If you are unable to complete it, we will walk you through it during our meeting.

Estate Administration/Probate Meeting

__ Copy of death certificate, qualification documents (if obtained), estate checking account statements (if opened), funeral bill and other debts of the Estate (if available), deeds of property owned by the Decedent (if applicable). If you do not have one or any of these documents, that's okay too. We will walk you through what's needed at our meeting.

Trust Administration Meeting

__ Copy of the Trust Agreement.
__ Any Trust banking or investment account bank statements.

Business Law Meeting

__ Business ideas and concerns.
__ Incorporation documents, current profit/loss statement, current balance sheet and its EIN number.
__ Copy of Shareholders Agreement or LLC Operating Agreement.
__ Copies of the Corporation's or Partnership's last 2 years of tax returns (1120, 1120S or 1065).
__ Copies of the most recent banking or other financial account information of the Corporation or the Partnership.

For All Meetings: Other documents you think relevant, esp. **time sensitive documents**.