5280 TAX & ADVISORY

New Client Tax Checklist

What to prepare before getting started with 5280 Tax & Advisory.

Before Your Meeting

[ ] Complete intake/qualification questionnaire

[ ] Provide prior-year returns

[ ] Identify all income sources

[ ] Upload requested documents securely

[ ] Provide IRS/state notices

[ ] List your goals/questions

Business Clients

[ ] Entity documents/EIN

[ ] YTD financial statements or bookkeeping access

[ ] Ownership information

[ ] Payroll/1099 information

[ ] Sales tax information

[ ] Prior accounting/tax issues

Planning Clients

[ ] Current-year income estimate

[ ] Prior-year tax liability

[ ] YTD withholding/estimated payments

[ ] Expected major transactions

[ ] Retirement/investment/real estate changes

[ ] Top three tax questions

Engagement

[ ] Review scope

[ ] Confirm secure document process

[ ] Confirm communication method

[ ] Confirm deadlines

[ ] Understand out-of-scope services may require separate authorization

Important Notice

Educational use only. This material is not individualized tax, legal, accounting, or financial advice and does not create an engagement. Tax rules, forms, deadlines, and state/local requirements can change. Verify current requirements before filing or making decisions.

Primary References

IRS Forms & Publications