

### **If your tax situation is more complex**

(for example, multiple income sources, work in different states, foreign income or assets, changes in residency, etc.), **please prepare the following documents:**

- Last year's tax return (if available)
- A copy of your passport or driver's license
- All income forms: W-2, 1099-NEC, 1099-MISC, 1099-K, 1099-G, 1099-INT, 1099-DIV
- Receipts, invoices, or statements for expenses
- Records of foreign income, bank accounts, or property (if applicable)
- Travel calendar or list of states worked in (if you moved or worked in multiple states)
- Dependent or child-related documents (if claiming tax credits)
- Contracts, leases, or investment documents (if applicable)

☐ **We'll guide you through the rest during your personal consultation — no matter how complex your case is, we're here to help.**

