PROFESSIONAL CLIENT RESOURCE

The Tax Planning Guide for Individuals & Families

A practical checklist for organizing records before a tax-planning conversation.

1

Organize income records

Complete records help a qualified tax professional evaluate the income sources and reporting documents that apply to the household or business.

> **Consider:** Gather employer, contractor, investment, and business income records before the appointment.

2

Document potential expenses

Receipts and contemporaneous records are more useful than estimates when eligibility and business purpose must be evaluated.

> **Consider:** Group records by category and keep the supporting documents available.

3

Discuss eligibility before acting

Tax treatment depends on current law and individual circumstances. A strategy that applies to one taxpayer may not apply to another.

> **Consider:** Ask a qualified professional to confirm eligibility and documentation requirements.

Use the guide as a conversation starter

Write down questions as you review the material. The client or an appropriate qualified professional can confirm what applies to your circumstances.



4

Separate Business and Personal Records

Organize accounts and documents so a qualified professional can identify their purpose more efficiently.

> **Consider:** Label uncertain items for discussion instead of assigning a tax treatment yourself.

5

Document Questions for the Advisor

Create a short list of changes, unusual transactions, or future plans that may affect the conversation.

> **Consider:** Ask which additional records are needed before conclusions are reached.



Your Practical Checklist

- ☐ Collect income statements and business records.
- ☐ Bring prior returns and relevant notices.
- ☐ Separate questions from assumptions about eligibility.
- ☐ Gather receipts and supporting expense documentation.
- ☐ List major household or business changes.
- ☐ Confirm current rules with a qualified tax professional.

> **Notice** what changed or needs clarification.

> **Organize** the records connected to each question.

> **Confirm** current requirements with the right professional.

YOUR NEXT STEP

Ready to discuss the next step?

Use the secure MQ Tax Services funnel to request information. The client will confirm services, availability, and situation-specific requirements directly.

Open the secure client funnel →

Bring useful questions

01 Organize the records you already have.
02 Note what you want the client to clarify.
03 Confirm current requirements before acting.

This guide is for informational purposes only and does not constitute professional tax, legal, or financial advice. Tax laws are complex and subject to change. Always consult with a qualified tax professional regarding your specific situation before making financial decisions or taking tax positions.

