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# Preparing for a Meeting with Your Tax Attorney

Whether you are meeting with a tax attorney for help with tax planning or because the IRS has informed you that you will be audited, it is important to be prepared. One way to be prepared is to review all of your tax information, including your returns, IRS forms or schedules, and all documents you relied on when preparing your return so the information is fresh in your mind. In addition, it is important to bring all documents related to the issue that you will be discussing with your attorney. Here is a list of some specific documents you may want to bring:

- A copy of your current and past years' tax returns
- Any correspondence you have had with the IRS regarding the issue about which you are seeking advice
- Documents showing your income from a job such as your Form W-2, pay stubs and bank statements
- Documents showing other sources and amounts of income from investments, dividends, interest, business income, capital gains and losses, annuities, unemployment compensation, prizes and awards, gambling winnings and Social Security benefits
- Documents relating to your home such as closing statements, purchase and sales contracts, mortgage interest statements and document that show the cost of any improvements to the home
- Records relating to your investments (stocks, bonds, mutual funds, IRAs) that show purchase price, sales price, interest and commissions
- Documents reflecting your expenses and possible deductions
- If you have a tax issue related to your business, bring incorporation documents, documents showing your business's structure and employees, balance sheets and its tax I.D. number

Documents reflecting your expenses and possible deductions can be broken down into numerous subcategories. Such documents might include sales slips, receipts and canceled checks. If you have any of the following expenses, you should bring the listed documents to your meeting:

- Medical expenses exceeding 7.5% of your adjusted gross income — hospital bills, doctor bills, therapy bills and records of all other medical expenses that you incurred
- Alimony — divorce decree and separation agreement
- Charitable contributions — cancelled checks and receipts from the organization that show how much you gave; records showing fair market value of property you donated; and records showing your out-of-pocket expenses when you perform services for a charitable organization
- Mortgage interest — Form 1098 (you will receive it if you paid more than $600 of interest)

- Taxes — records that show how much you paid in real estate tax, state income tax (your state income tax return or Form W-2, which shows how much state income tax was withheld) and other kinds of taxes
- Business use of home — documents showing the part of your home that is used and expenses related to your business use
- Business expenses such as travel and entertainment — receipts and other documents that show the cost of hotels, meals, rental cars, taxis, tips and other fees
- Casualty and theft losses —records that show the type of loss (flood, hurricane, theft), what you lost, photographs of damage, appraisals and proof of ownership
- Child care expenses — documents showing the name, address and taxpayer identification number for all persons or organizations that provide care
- Education expenses — documents showing your qualified educational expenses, including tuition
- Moving expenses — receipts, invoices and other documents that show unreimbursed expenses related to moving such as money paid to a moving company, tolls, gas, hotels and meals

Another way to be prepared for the meeting with your tax lawyer is to prepare a list of questions for the attorney. The following is a list of questions you may wish to ask:

- How much will it cost to handle my issue?
- How long will my case take?
- What is the process?
- How will you go about handling my case?
- Have you handled this issue before?
- How many tax cases have you handled?
- What is your record of success in tax cases?
- Will other attorneys, paralegals or secretaries assist you with my case?

By reviewing your tax-related records, bringing relevant tax documents with you and thinking about questions you wish to ask your attorney, you will be well prepared for the meeting.