How to Make an Appointment / What to Bring

Currently, all our appointments are made by phone. Please call (586) 731-7581 and someone will help you decide on a day and time.

Drop-offs do not require appointments, but so that we can give you the best service possible, we ask that you be available after the return is complete for a short “consultation” phone call (10 minutes or so).

Most of what you need to bring is listed in the right-hand columns of the client organizers, but in general it would be helpful for us to have any information related to taxable income or business expenses. We need social security numbers and birthdates for everyone on the return, and we need bank information (account number and bank routing number) if you wand your tax refund deposited directly into a bank account instead of mailed to you.