



# ATLAS CFO

Not Your Traditional Accountants



## Questions to ask your tax accountant during your planning meeting:

1. What opportunities are available to my business in tax credits and bonus depreciation?
2. If you have multiple entities, what tax planning strategies are available to me in relation to the businesses I have? Are there opportunities that I am not taking advantage of?
3. If you have major changes expected, make sure to discuss opportunities and pitfalls surrounding it.
4. What would you expect my tax liability to be on the due date?
5. What would you expect my estimated tax payment to be on the due date?
6. When do you need my information? How long will you take to complete your work?
7. Who will be assigned to my account? Do I contact him/her directly?
8. What information will you need from me to complete the tax return(s)?

