

Preparing for your first CPA conversation

Bring a sense of where you are and what you'd like help with. You don't need to have every tax question worked out before we talk.

Before we talk

- ☐ **Name your main reason for reaching out.**
For example: preparing a return, planning around changing income, starting a business, or understanding a notice.
 - ☐ **Sketch the broad picture of your income.**
Be ready to describe employment, self-employment, a business, investments, or a combination. A general overview is enough to begin.
 - ☐ **Think about what changed.**
Make a short list of relevant household, work, income, or business changes and any decisions you are considering.
 - ☐ **Flag the timing that matters.**
Know which tax years you need help with and mention any filing or notice response deadlines.
 - ☐ **Make room for the video conversation.**
Check your meeting details, connection, and a quiet place to talk. Keep a few questions nearby.
-

Questions to ask

- ☐ **What work would the engagement include?**
Ask which returns, planning topics, and responsibilities would be covered for your situation.
 - ☐ **How would we work together?**
Discuss communication, the information needed, secure document exchange, and the next steps.
 - ☐ **How are the scope and fees agreed?**
Make sure you understand the proposed engagement before deciding whether to move forward.
-

Documents come through a secure channel.

The first conversation is about your needs and whether we're a good fit. If we move forward, a signed engagement letter defines the work, and a secure portal is arranged for document exchange.

Keep Social Security numbers, dates of birth, account numbers, and tax documents out of the public contact form and booking notes.

For later return preparation, the [IRS document checklist](#) explains common records to gather. We will discuss what is relevant to the work in your engagement.

Aeraphim CPA • www.aeraphimcpa.com/consultation-guide
Schedule a conversation at www.aeraphimcpa.com/schedule