

BUSINESS TAX DOCUMENTS CHECKLIST



- All monthly ledgers for the year
- All bank statements for the year
- All business credit card statements for the year
- Mileage for the year: personal, commuting, and overall
- List of all income and expenses
- Detailed list of all company assets, including:
 - Purchase or selling price
 - Purchase or sold date

GENERAL INFORMATION



- NEW CLIENTS** - Prior two year's business tax returns
- Know your Employment Identification Number (EIN)
- Know your business filing type, whether it is:
 - C-Corporation
 - S-Corporation
 - Limited Liability Company (LLC)
 - Partnership