

**Basic Info:**

- Determine business return type for filing as registered with IRS (Form 1065, 1120, or 1120S). If unsure, contact the IRS Business Help Line at 1-800-829-4933
- Employer Identification Number (EIN) as registered with the IRS. If you don't have an EIN, apply online at IRS.gov
- List of states and state ID numbers in which your business has nexus or a presence that requires reporting
- Copy of partnership agreement or bylaws including any amendments
- Last year's federal, state, and local tax returns
- All amounts and dates for state and local estimated tax payments made

**Partner Info:**

- Name, address, and SSN/EIN of each partner during the tax year
- List of each partner's profit/loss/ownership percentage
- Reports for all owner capital contributions, withdrawals, or loans
- Reports for all partner guaranteed payments, compensation, and benefits including cost of medical and life insurance
- Reports for detailing any change in ownership during the tax year

**Documents Received:**

- All Forms 1099-B, 1099-DIV, 1099-INT, 1099-K, or 1099-MISC received (or other records for dividends, interest, or business income)
- Schedule K-1 received from entities that your business owns
- All granted credit certificates issued by federal or state taxing authorities

**Business and Financial Records:**

- Trial balance report from company books
- Bank and credit card records to support interest and other day-to-day business expenses
- Copy or summary of all Forms 1099 and W-2 issued
- Reports detailing all federal unemployment, Social Security, and Medicare tax paid (Forms 940 & 941)
- Reports of state and local payroll tax paid
- If business was conducted in multiple states, compile a report of sales, payroll, and property values for each state
- Reports for inventory including cost of goods or materials purchased for resale or manufacture and the total value of goods or materials at the end of the year

**Asset Records:**

- Prior year depreciation schedules detailing asset cost, date placed in service, prior depreciation, and business use percentage
- Date of purchase, cost, trade-in allowance, and business use percentage for all assets acquired during the tax year
- Date of purchase, cost, sales proceeds, trade-in allowance, expenses of the sale, and accumulated depreciation for all assets disposed of during the tax year
- Mileage log for each owned or leased vehicle (business use and total use)
- Reports for business use percentage and actual expenses for each owned vehicle (gas and maintenance costs)

**OTHER:**

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