



"ACCOUNTING TODAY FOR TOMORROW'S FUTURE"

Business Tax Client Organizer

- Certificate of Organization
- SS-4 Employer Identification Letter
- 2553 Acceptance Letter for LLC's taxed as S-Corporations
- Accurate Profit & Loss Statement and Balance Sheet for the entire year
- Driver's License for all owners/officers holding interest in the company
- Social Security Cards for all owners/officers holding interest in the company
- W-3 & W-2's for ALL employees paid throughout the tax year
- 1096 & 1099's for Independent Contractors paid over \$600 throughout the tax year

OR

- Business Bank/Credit Card Account access or statements
- Cash Receipts
- List of Equipment/Furniture/Property used for business - costing more than \$500
 - Purchase Date
 - Total Purchase Price
- List of Business Loans
 - Loan Origination Date
 - Original Loan Amount
 - Current Loan Balance
 - Amount paid on Principal Balance to-date
 - Amount paid in Interest to-date
- Copy of prior year Tax Return (S-Corporation or Schedule C, if one was filed)
- List of Income & Expenses if you have one

Please note: If unable to provide an accurate Profit & Loss Statement and Balance Sheet for the year, we will need to compile a QuickBooks company file for you at additional costs. Please see request our Client Fee Schedule for a breakdown of fees.