



"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
    - o Amount paid on Principal Balance to-date
    - o 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.