

10-Step Tax-Ready Checklist

Stay Organized • Maximize Deductions • Stress Less

1. Keep all income records (invoices, receipts, bank deposits).
2. Track and categorize all business expenses monthly.
3. Save receipts for deductible expenses (meals, travel, supplies).
4. Separate personal and business bank accounts.
5. Record mileage and vehicle expenses accurately.
6. Organize payroll and 1099 contractor documentation.
7. Maintain up-to-date bookkeeping (monthly reconciliations).
8. Collect and store W-9s for all vendors/contractors.
9. Review estimated quarterly tax payments and deadlines.
10. Meet with your accountant or tax preparer before year-end.

Bear Country Consulting

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