



Business Tax Returns Required Documents (Corporations & Partnerships/LLCs)

Over one year in business:

- Prior year Federal & State business tax returns
- Financial Statements for the tax year (Profit & Loss and Balance Sheet)*
- Fixed Asset Depreciation Schedules from prior year
- Details of additions or removal of fixed assets during the year (machinery, equipment, furniture, property, vehicles...etc.)
- Business bank statements for the tax year and December of the prior year (PDF file for each month and a Quickbooks file from 1/1 to 12/31)
- Details in change of ownership (shareholder or partnership percentages)

*If financial statements are not prepared, an additional fee will apply for year-end bookkeeping to prepare financials.

First Year in Business:

- Copy of the Articles of Corporation/Organization
- EIN; Employer Identification number issued by the IRS
- Shareholders/Partners :
 - Full names
 - Addresses
 - Social security numbers
 - Ownership %
- Financial Statements for the tax year (Profit & Loss and Balance Sheet)*
- Details of purchases of fixed assets during the tax year (machinery, equipment, furniture, property, vehicles...etc.)
- Business bank statements for the tax year (PDF file for each month and a Quickbooks file from the date the account was opened to year end, 12/31)

*If financial statements are not prepared, an additional fee will apply for year-end bookkeeping to prepare financials.

For more details, please contact us at (559) 733-8637