

## Partnership 1065 Tax Return Checklist

### General Information

- ☐ Partnership's legal name, address, and EIN.
- ☐ Partnership agreement detailing ownership percentages and responsibilities.
- ☐ State registration documents for the partnership.
- ☐ Copy of prior year's 1065 tax return.
- ☐ Valid government-issued ID for each partner.

### Income Documents

- ☐ Gross receipts or sales records.
- ☐ Forms 1099-MISC, 1099-NEC, or 1099-K for payments received.
- ☐ Rental income (if applicable).
- ☐ Other business income records (e.g., grants, commissions).

### Expenses

- ☐ Payroll records, including Forms W-2 and W-3.
- ☐ Contract labor expenses (Forms 1099-NEC issued).
- ☐ Business rent or lease payments.
- ☐ Utility bills (e.g., electricity, water, internet).
- ☐ Business insurance premiums.
- ☐ Advertising and marketing expenses.
- ☐ Legal and professional fees.
- ☐ Office supplies and expenses.
- ☐ Depreciation schedules for fixed assets.
- ☐ Interest paid on business loans (Form 1098).
- ☐ Travel, meals, and entertainment expenses (with receipts).
- ☐ Repairs and maintenance costs.

### Balance Sheet Information

- ☐ Bank statements for all business accounts.
- ☐ List of accounts receivable and payable.
- ☐ Inventory records (if applicable).

- ☐ Loan statements showing balance and payments.
- ☐ Details of fixed asset purchases and disposals.
- ☐ Partner capital account summaries.

### Partner Information

- ☐ Full name, address, and SSN or EIN for each partner.
- ☐ Ownership percentages for each partner.
- ☐ Partner contributions and distributions records.
- ☐ Guaranteed payments to partners.

### Tax Payments and Credits

- ☐ Estimated tax payments made (with proof of payment).
- ☐ Schedule of any tax credits or deductions claimed.
- ☐ Form 8949 for capital gains and losses (if applicable).

### Other Important Documents

- ☐ Correspondence from the IRS or state tax authority.
- ☐ Copies of any business licenses or permits.
- ☐ Bank loan agreements and terms.
- ☐ Documentation of major contracts or agreements.
- ☐ IRS-issued Identity Protection PIN (if applicable).