

# New Client Business Returns

C Corporation \_\_\_\_\_ S Corporation \_\_\_\_\_ Partnership \_\_\_\_\_

Business EIN \_\_\_\_\_ Business Address \_\_\_\_\_

**If a Partnership:** \*Personal Information of all Partners (Name, SSN, DOB, Address, Percentage of Partnership per person needed)

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1. Estimated tax payment made throughout the year.
2. Year-end profit & loss statement and balance sheets (income and expense breakdown)
3. Start of year Inventory and End of year Inventory
4. Depreciation Schedule
5. 3 years Past Business Tax returns (if in business that long)
6. Year-end Investment account statements
7. Employer's annual wage report (W-2) and transmittal form (W-3)
8. All payroll tax forms for the year, including 940, 941, and state-related withholding and unemployment forms.
9. Records regarding expenses for business use of vehicles
10. Do you have a home office used exclusively for business?
11. Business expense documentation