

Tax Time Any Time

IT Tax and Business Solutions

A One-Stop Solution for your business needs!

Checklist and Onboarding Requirements

Accounting: Bookkeeping/Payroll/Tax/Advisory

The purpose of this checklist is to verify if you are financially prepared and have all the required documentation required to prove ownership and financially prepared to pay for all services as agreed.

A non-refundable deposit is required starting at \$125-\$525 or 50% of the total cleanup cost.

Why? Our team will immediately go to work to verify information, review QuickBooks, or other accounting programs, review financial statements and verify bank statements.

Document Requirements:

- **Business Numbers and Registrations**
 - Articles or Certificate of Organization from Secretary of State to verify legal business license.
 - EIN authorization letter from the IRS.
 - State Department of Revenue
 - State Unemployment/Labor Department
 - Sales tax or City tax filing
- **Business Bank Account**
 - Bank Statements are required/credit card, merchant accounts like (PayPal and/or Square if you use these accounts to pay bills or invoice clients to receive money for products or services.
 - Bank feeds are optional (Unless there is another merchant account monitoring income and expenses) if starting this service after the 1st 90 days of the year, printed bank statements are needed. If using an accounting software, please invite us using our accountant email address advisor@taxtimeanytime.com. Irene Tryon is the tax accountant and can be reached at 402-933-9700 ext. 100. Email Irene if you have any questions at advisor@taxtimeanytime.com
 - Upload all CSV (Excel) bank transactions for each month if you are not able to connect your bank account to a cloud accounting program.
- **Business Transactions**
 - Upload receipts to our secure portal or scan to a thumb drive.
 - If not able to upload or scan, organize receipts by dates in separate envelopes for manual entry. (Additional hourly fees will apply)
 - Excel reports for cash logs be acceptable. Headers must have the following: (Date, Vendor Name, Amount, Description, Method of payment (or payment type with check numbers)
 - <https://portal.ittaxsolutions.org> (you must accept the invitation first, then create a password to log in.

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- **Taxes**
 - Any previous tax reports, payroll reports or sales tax reports
 - ID numbers used to report and pay taxes
 - Copy of Income Tax Return for current and previous tax year
- **Software:**
 - Other software access logins associated with bundle services listed above.
If you already subscribed to QuickBooks, no changes are needed. You may keep your subscription current.

Call or Text 402-933-9700

IT Tax and Business Solutions LLC
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How to contact us:

Portal access: <https://portal.ittaxsolutions.org>

Tax and Business website: <http://ittaxsolutions.com>

Advisory Tax Service website: <https://taxtimeanytime.com>

Company Email: taxadvisor@ittaxsolutions.com

Staff Email: <mailto:staff@ittaxsolutions.com>

Email Customer Support: <mailto:support@ittaxsolutions.com>

Email IT Technical Support: <mailto:vernon@ittaxsolutions.com>