BUSINESS CLIENT

(Sole Proprietor, Farms, Partnership, S- & C- Corporation)

WHAT TO BRING TO YOUR TAX APPOINTMENT

ALL CLIENTS	
☐ All 1099 forms received for Business Income	☐ Auto Notes/Information/ Year-End Balance
☐ Total Business Income & Categorized Expenses	☐ Equipment Notes/Information/Year-End Balance
☐ Rental Income & Expenses (by Rental Address)	☐ Operating Loans/Documentation/ Year-End Balance
☐ Office-In-Home Information (*if applicable*)	☐ Checkbook Registers
☐ Mileage Log/Vehicle Information (by Vehicle)	☐ Bank Statements
☐ 1099's issued to Vendors or Contractors	☐ Daily Cash Reports / Sales Registers
☐ Year-end Operating Account Balance(s)	☐ Petty Cash Receipts
☐ Year-end Business Note Balance(s)	☐ Accounts Payables Aging/Invoices
☐ Year-end Business Credit Card Balance(s)	☐ Accounts Receivables Aging/Invoices
☐ Business Equipment Purchase Receipt(s)	☐ ***NEW CLIENTS ONLY***
☐ Business Vehicle Purchase Receipt(s)	☐ Prior Year's Tax Returns: Federal & State(s)
☐ Business Asset Sale/Disposal Information	☐ Current & Prior Year Balance Sheets
☐ Copy of W2s issued & Year-end Payroll Reports (if TaxesPlus does NOT process your payroll)	☐ Current & Prior Year Profit & Loss Statements

TaxesPlu$

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