

BUSINESS CLIENT – TAX CHECKLIST

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

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



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