

BUSINESS TAXPAYERS

For the preparation of business returns taxpayers should bring the following documentation.

1. Backup copy of software used on either disc or flash drive to load into our system if QuickBooks or Peachtree is used in your business.
2. Flash drive or backup of excel files used for your business.
3. Copies of check statements from bank for the year and the first month of the next year.
4. Copies of and business credit card statements for the year and the first month of the next year.
5. List of new asset purchases including date of purchase and amount paid. A separate list of assets sold or disposed of including and proceeds from sale.
6. Copies of any legal documents to start business, sell business, add a partner, or other legal correspondence which details any changes. Other documents would include retirement plan documents.
7. Copies of year end bank statements detailing balances on loans for the last month of your tax year.
8. Payroll reports including quarterly payroll reports, copies of W-3 and W-2's for employees, and state payroll filings.
9. Tax notices received from and federal or state governmental agency.
10. Final Payroll report for year from a payroll company if using one.
11. Any 1099 income statements received by business.
12. A list of all 1099 forms that need to be sent out after the end of the year including recipient addresses and social security numbers.
13. List of names, addresses, and social security numbers of all partners or owners of the business to verify changes.