

BUSINESS TAX PREPARATION CHECKLIST

Business Details

- Name of Business: _____
- Type of Entity:
 - LLC
 - Partnership
 - S Corp
 - C Corp
- Federal Tax ID #: _____
- State Tax ID #: _____
- Copy of Bylaws
- Copy of Articles of Incorporation
- Copy of Stock Certificates
- Certificate of Good Standing with CO Secretary of State

Information for Tax Preparation

- Year-End Financial Statements
 - Profit & Loss
 - Balance Sheet
 - QuickBooks Access (Discuss with Our Team)
- Copies of 1099s
 - Interest Income: 1099-INTs & 1099-OIDs
 - Dividend Income: 1099-DIVs
- List of All Non-Taxable Deposits
 - Shareholder Loans
 - General Bank Loans
- List of Depreciable Assets
 - Purchase Date per Asset
 - Purchase Price per Asset