Tax Return Checklist | Business

If we didn't file the return last year please bring/upload the most recently filed Federal & State Tax Returns
(Information carries from one year to the next. Be sure to include all K1's and Basis Statements)

Business Information Needed

1) Upload the income & expense information.

    -This can come in various forms: Quickbooks statements, Sales summaries or other helpful statements.

2) Upload the year end bank statemetns, credit cards & business loans as of 12/31.
3) Upload the year end payroll deatails reports if you paid wages. Also, be sure to upload the W2's of all of the shareholder's receiving wages.
4) Upload any 1099’s received by the business.
5) Upload the square footage of your Home and the Home Office. Be sure to incldue expenses for Cellphone, Internet, Mileage, and others as applicable.
6) Upload all business formation documents. Articles of Organization, EIN Letter, Form 2553 & S-corp Acceptance Letter (If Applicable)
7) Upload a valid Driver's Liscense or ID for all Owners/Shareholders of the business. Additional Tax information will be required for all shareholders receiveing a K1.

S-corp & Partnership Filing Deadline: March 15th
Cutoff Date S-corps & Partnerships: February 9th

Extension filing fee: $100

Turnaround Time
From the time information is submitted, please allow a 7-10 business day turnaround time before we dig into the return and reach out with any questions.