



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 statements, credit cards & business loans as of 12/31.
- 3) Upload the year end payroll details 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 include 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 License or ID for all Owners/Shareholders of the business. Additional Tax information will be required for all shareholders receiving a K1.

Tax Return Preparation Fee is \$175/hour

Bookkeeping rate is billed at \$100/hour

S-corp & Partnership Filing Deadline: March, 15th
Cutoff Date S-corps & Partnerships: February, 10th

Extension filing fee: \$100
Rush Fee \$300/yr (if available)

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.

Rush Fee

We may expedite the processing of the tax returns in certain situations when this service is available. Rush Fees are per year, and additional bookkeeping rush fees may apply.