



What You Need for Tax Preparation

Business Income Information

- Copy of Prior Year State and Federal Return and all Schedules.
- IRS Approval Letter for S-Corps and C-Corps
- Income and Expenses (Profit and Loss and Balance Sheet for Year)
- Business Fixed Asset list (if applicable)
- Business Use of Vehicle Information, miles driven for business, year, make, model, year put in service.
- Home Office information, square footage, expenses etc.
- Estimated Tax Payments
- State and Local Tax Returns
- 1096 and 1099NEC Copies
- Payroll Returns (If Applicable) 941, 940, W2/W3
- Partnerships:
 - Name, Address, phone, email for all partners
 - Formation documents or Operating Agreement

Partnerships

- Name, Address, phone, email for all partners
- Formation documents or Operating Agreement

Questions?