



BUSINESS TAX PREPARATION DOCUMENT LIST

- A COMPLETED "NEW BUSINESS CLIENT" FORM
- A COPY OF LAST YEAR'S TAX RETURN (IF NOT PREPARED BY OUR OFFICE)
- ARTICLES OF INCORPORATION
- CERTIFICATE OF FORMATION
- BUSINESS LICENSE
- S-ELECTION ACCEPTANCE LETTER FROM THE IRS
- OPERATING AGREEMENT
- BACK-UP OF QUICKBOOKS OR OTHER BOOKKEEPING FILE
- YEAR-END/DECEMBER 31 BANK STATEMENTS
- DECEMBER 31 LOAN AND/OR CREDIT CARD STATEMENTS
- FULL YEAR COPIES OF 941's, SUTA, L&I, B&O
- COPIES OF W3'S AND W2'S
- FORM(S) 1099-K (MERCHANT SERVICES)
- COPIES OF FILED DOR EXCISE TAX REPORTS
- LETTER ID (IF WE ARE FILING EXCISE TAX RETURNS/OBTAINING COPIES OF FILED RETURNS)

****PLEASE NOTE THAT ALL OF THE ABOVE MAY NOT APPLY TO YOUR BUSINESS, AND WE MAY REQUIRE ADDITIONAL INFORMATION.***