

Business Tax Return Checklist

Company Name _____
Company Type _____ S-Corp _____ C-Corp _____ Pship _____
Contact Number _____
Email _____

- _____ E-mail QuickBooks Portable File to scott@sboyarcpa.com (if password protected, send password in separate e-mail)
- _____ Copy of year end bank and loan statements
- _____ Copy of year end payroll reports (should include report for entire year)
- _____ Copy of all filed payroll forms, Federal, State and Local
- _____ Copy of County Property Tax Return. If you don't have one call me
- _____ Copy of your Privilege License--if not otherwise licensed by the State
- _____ Copy of Sales tax reports
- _____ Listing of all Business equipment, furniture and vehicles **purchased** during the year. Include:
 - _____ Full description of all asset purchases, including date purchased & cost
- _____ Listing of all Business equipment, furniture and vehicles **sold or disposed** during the year. Include:
 - _____ Full description of all asset sold or disposed of, including date sold & selling price and financing agreements
- _____ Provide a schedule of any loans or advances made by an owner of the Company
- _____ Itemize a list of unreimbursed expenses paid by the owner related to the business
- _____ Amount of health insurance for the owners and how paid (business or personal)
- _____ What states do you do business in and do you physically do work in that state
- _____ For New clients to our practice please provide last two years of tax returns

Your Comments or concerns you would like to discuss with me. _____

