

Corporation, S-corp, partnership tax Information checklist

General documents

- Company name exactly as it appears on official documents
- DBA if exists
- Address
- Type of business, services, products
- EIN – form SS-4
- Article of incorporation/organization
- S-election confirmation letter
- Estimated taxes paid.

Sources of Income

- 1099 forms received
- 1099 K forms received
- Gross receipts from sales or services
- Sales records, including returns and allowances
- Other income.

Expenses

- Records of all business expenses
- Documentation for home office expenses, including square footage of home and square footage of area used exclusively for business
- Records for business assets to be depreciated, including cost and date placed in service
- Miles traveled for business purposes and total mileage, make and model of the car
- Inventory
- All expenses, including insurance, loan interest, office supplies, and professional fees
- Wages, bonuses, and commissions paid
- Subcontractor expenses

- Rent for your business
- Business checking and savings account interest
- Other.