

# **BUSINESS TAX FORMS CHECKLIST**

✓ Which business entity that applies and gather all applicable documents

**Self Employed | Single Member LLC**

- Completed Business info questionnaire
- Prior year tax return
- Profit & Loss Statement
- Balance Sheet
  - Depreciable assets (if applicable)
- Received 1099-MISC/NEC
- Received 1099-K
- Interest/Dividend Income
- Payroll Documentation
  - Form 941(All 4 quarters)
  - Form 944
  - State reconciliation tax payments (if applicable)

**Partnership | Multi Member LLC**

- Completed Business info questionnaire
  - Each partner's basic information
    - Individual Legal Name
    - SSN
    - Address
    - Partner's interest percentage
- Prior year tax return
- Profit & Loss Statement
- Balance Sheet
  - Depreciable assets (if applicable)
- Business Bank Statements
- Received 1099-MISC/NEC
- Received 1099-K
- Interest/Dividend Income
- Payroll Documentation
  - Form 941(All 4 quarters)
  - Form 944
  - State reconciliation tax payments (if applicable)

**S-Corporation | C-Corporations**

- Completed Business info questionnaire
  - Shareholder basic information for S-Corporations
    - Individual Legal Name
    - SSN
    - Address
    - Shareholder's percentage
- Prior year tax return
- Profit & Loss Statement
- Balance Sheet
  - Depreciable assets (if applicable)
- Business Bank Statements
- Received 1099-MISC/NEC
- Received 1099-K
- Interest/Dividend Income
- Dividend payout information (if applicable)
- Payroll Documentation
  - Form 941 (All 4 quarters)
  - Form 944
  - State reconciliation tax payments (if applicable)

