

## BUSINESS TAX FORMS CHECKLIST

✓ Which business entity applies and gathers all applicable documents

Section 1			
Yes	No	Unsure	
			1. What business entity do you operate under? <ol style="list-style-type: none"> <li>1. Self-Employed (Sole Proprietor)</li> <li>2. Partnership</li> <li>3. S-Corporation</li> <li>4. C-Corporation</li> </ol>
Section 2			
			1. Did you complete our business tax questionnaire? 2. Have you uploaded your prior three years of tax returns? 3. Have you uploaded your Profit and Loss Statement? 4. Have you uploaded your Balance Sheet? 5. Do you have any depreciable assets? 6. Have you received a 1099-MISC or 1099-NEC? 7. Have you received a 1099-K?

1635 Market Street, Suite 1600  
Philadelphia, PA 1910  
(215) 717-8293

1100 Peachtree St NE, Suite 950  
Atlanta, GA 30309  
(404) 301-9366

[info@brownsaaf.com](mailto:info@brownsaaf.com)  
[www.brownsfca.com](http://www.brownsfca.com)

			<p>8. Did you have any interest or dividend income?</p> <p>9. Have you uploaded all payroll documentation? (Form 941/944, Payroll Summary)</p> <p>10. Did you receive the Employee Retention Credit (ERC)?</p> <p>11. Did you receive the Paycheck Protection Program (PPP)?</p> <p>    1. Was it forgiven?</p>
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