

Business Tax Return Document Checklist

- Company Name, Address, and EIN
- Business description
- Owner Information including names, addresses, SS#'s and ownership percentages.
- Current accountants copy of QuickBooks
- Bank statements as of December 31
- Credit Card Statements December 31 of tax return year and January of current year.
- Worksheet of owner's expenses paid from personal accounts.
- Receipts for equipment purchases and/or invoices for equipment sales.
- Payroll summary for the year and W2/W3's.
- Business Mileage log-total miles and business miles.