



We can handle it!

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READ ** SIGN ** RETURN WITH DATA

2019 Business Tax Checklist

I have reviewed and marked this checklist and Business deduction list for items related to my tax return

Business Name

Signature

Date

Best Phone number

Email

Preferred contact (circle): Phone Text Email

8-8 or _____ (We cannot receive text)

Please answer (circle) all, make notes as needed and return with tax information

Basic Business Info

- Any change to current owners? YES NO
- Any change in the % of ownership? YES NO
- Current business address: _____
- Current phone number of the business: _____

Current year operations

- Description of current year business activity: _____
- If we do your accounting, skip this section!!** (You love tax time don't you!) If we do not do your accounting:
 - What is your current method of accounting/record keeping: _____
 - Is the Balance Sheet **provided**: Cash Basis Accrual Basis
 - If no Balance Sheet: Bank Balance(s) at 12/31: _____
 - Loan and credit card balances: _____
 - Is the Income Statement (profit & loss) **provided** in: Cash Basis Accrual Basis
 - Did you pay for labor (services) to any individual, LLC, attorney, or other entity requiring 1099? YES NO
 - If you paid \$600 or more for labor/services did you issue 1099's? YES NO
 - Did you purchase any fixed assets during this tax year? YES NO
 - Did you sell any fixed assets during this tax year? YES NO
 - Did any shareholder/member/owner contribute money to the business this tax year? YES NO
 - Did any shareholder/member/owner withdraw money from the business this tax year? YES NO
 - Did the business take out any **new loans** this tax year? YES NO
 - Is bank account(s) **reconciled** as of 12/31? YES NO

Business Assurances

- Are all income and expense items included in data provided? YES NO
- Are all shareholder/owner paid expenses reflected in the data provided? YES NO N/A
- Are all meals expense included qualified as business expense and accurately documented? YES NO N/A
- Do all uniforms contain company logo? YES NO N/A
- If there is inventory held at 12/31 the value is provided at cost? YES NO N/A
- If we don't do your payroll, are copies of W-2's to shareholders included? YES NO N/A
- If we don't do your payroll, how many W-2's were issued for this tax year? _____

Other Notes: