



Business Tax Return Checklist

ENTITY & REGISTRATION DOCUMENTS

****Only if your incorporation services were done elsewhere****

- ☐ Articles of Incorporation / Organization (If new or changed)
- ☐ EIN letter from IRS (Form SS-4 confirmation)
- ☐ Operating Agreement or Partnership Agreement (If applicable, if not, we can help you draft an agreement because it is a legal internal document)
- ☐ S Corporation Election (Form 2553), if applicable
- ☐ State registration / renewal confirmations / Annual Reports

PRIOR YEAR TAX RETURNS

****Only for new clients****

- ☐ Full copy of 2024 federal and state business tax return
- ☐ K-1s received or issued in 2024
- ☐ 2024 depreciation schedules

FINANCIAL STATEMENTS

- ☐ Profit & Loss Statement (Jan 1-Dec 31, 2025)
- ☐ Balance Sheet as of Dec 31, 2025
- ☐ Access to your books by adding us to your QBO
- ☐ Bank and credit card statements

EXPENSE SUPPORT DOCUMENTS (If Applicable)

- ☐ Loan interest statements (business loans only)
- ☐ Insurance invoices (business liability, E&O, etc.)
- ☐ Rent/lease agreements or payment records
- ☐ Utility bills (if home office deduction applies)
- ☐ Auto mileage log or actual expense records (if vehicle used)

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TAX SERVICES

- ☐ Asset purchase receipts / invoices over \$2,500

TAX PAYMENT DOCUMENTS

- ☐ Estimated tax payment confirmations (dates + amount)
- ☐ Sales tax filings or summaries (if applicable)
- ☐ Copies of IRS or state tax documents (2025)

SPECIAL CIRCUMSTANCES

- ☐ Records of business assets sold/disposed in 2025
- ☐ Legal documents for ownership or structural changes
- ☐ Foreign account or transaction disclosures (if any)
- ☐ Crypto or digital asset transaction records
- ☐ Charitable contributions from the business (with receipts)