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WHAT TO BRING or Send for Tax preparation - Businesses

- ☐ Copies of last year's Federal and State returns
- ☐ Prior year financial statements
- ☐ Details of any distributions to or contributions from owners
- ☐ Schedule of any owner fringe benefits received
- ☐ Schedule of loans to and from owners including loan agreements
- ☐ Details of any related party transactions
- ☐ Amounts and dates of estimated tax payments
- ☐ Listing of interest and dividend income
- ☐ Vehicle information and use including vehicle leases
- ☐ Information on any employee benefit plans including retirement plans, health insurance, etc.
- ☐ Details of meals and entertainment expenses
- ☐ List of activities in other states
- ☐ Details of fixed assets and depreciation schedules
- ☐ Fixed asset purchase information including acquisition date, cost, and description
- ☐ Fixed asset sales/disposition information including date acquired, cost, previous depreciation, date sold, retired, or disposed of, and sale proceeds