



## Year-End Small Business Tax Checklist

The following information is needed to file a Complete and Accurate LLC/Corporate/Partnership tax return:

- Bank statements from all Business Accounts
- Detailed accounting records including ledgers
- Loan papers & purchase details for new assets purchased (Depreciation)
- Statements of dividends or interest earned
- Payroll details records & copies of form 941, 940, 1099, W-2 (files if any)
- Year-end inventory (if any)
- Copies of any correspondence with taxing authorities (Fed or State)
- Details of Corporate/LLC/ Partnership, distributions to shareholders (their names & details).
- New LLC/ Corporation/Partnership S-Election letter, Federal ID#, last Year's Corporate return (new client)
- Mileage detail for company-owned/used vehicles (year, make, model) and total miles driven for year
- Forms 1099-K received from credit card and internet payers