

# TAXES *by* KPR

TAX • BOOKKEEPING • BUSINESS SERVICES

## S-Corp & Partnership Checklist

Use this checklist to gather the documents needed to prepare your business tax return.

### Business Information

- Business Name
- EIN Confirmation Letter
- Business Formation Documents
- Ownership Information
- Prior Year Business Tax Return

### Income

- Profit & Loss Statement
- Business Income Records
- Sales Reports
- 1099 Forms Received
- Any Other Income Documents Received

### Expenses

- Business Expense Records
- Bank Statements
- Credit Card Statements
- Payroll Reports
- Insurance Expenses

### Assets & Vehicles

- Equipment or Asset Purchases
- Vehicle Information & Business Mileage
- Loan Information

### Owners & Partners

- Shareholder/Partner Information
- Distributions or Draws
- Changes in Ownership (if applicable)

### Additional Tax Information

- Estimated Tax Payments Made
- 1099s Issued to Contractors
- IRS or State Tax Notices
- Any Other Tax-Related Documents

**Important:** Please provide all tax documents and business records, even if you are unsure whether they are needed for your return.