



Partnership Tax Return Checklist

- Copies of prior year Federal and State tax returns, if applicable. For first-year tax return preparation, provide the following:
 - Copy of entity formation documents (i.e. LLC formation documents).
 - Description of business activity and principal product or service.
 - Employer Identification Number (SS-4 Letter issued from the IRS).
- Financial Statements
 - Profit & Loss Statement
 - Balance Sheet
 - List of Contributions by each partner during the year.
 - List of Distributions to each partner during the year.
 - For active partners, a summary of guaranteed payments to each partner.
- List of assets (property & equipment) purchased during the current year to include the date and dollar amount or purchase.
- List of all Partners to include their name, address, SSN, and percentage of the partnership interest at the beginning of the year, and at the end of the year.

Please note, this questionnaire is not a comprehensive list of all required information, and additional documentation may be required.