



Small Business Tax Return Checklist

- Copies of prior year Federal and State tax returns, if applicable. If the first year in business, provide Federal Employer Identification Number (EIN), and State ID, if applicable.
- Financial Statements. Identify if Cash/Accrual basis, and if a fiscal year.
 - Profit & Loss Statement
 - Balance Sheet
- List of depreciable assets (property & equipment) purchased during the current year to include the date and dollar amount or purchase.
- Vehicle Information (If using your personal vehicle for business).
 - Mileage Log of all car travel during the year.
 - Year, make, and model of vehicle used for business.
 - Vehicle expenses to include lease payments, amounts paid for gas, maintenance, etc...
- Inventory information, if applicable. Provide documentation regarding beginning inventory, ending inventory, and purchases made during the year.
- Payroll Tax Returns, if applicable. Alternatively, provide payroll documentation from third party processors which include amounts of compensation and employment tax paid during the year.

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