



Jefferson-Franklin Tax Services

YOUR TAXES: Planned. Prepared. Solved!

Main: 623.240.9545 | Toll-Free Fax: 866.779.5210 | Email: info@jeffersonfranklintax.com

BUSINESS INFORMATION CHECKLIST

- Business Name, Address and Type:
- Products or services provided
- Form of identity(Sole Proprietor, Partnership, LLC, Corp)
- Federal Taxpayer ID Number
- Date Business Formed
- Copies of the Last Two Years' Business Returns
- Statements of Income: 1099 and/or Own Records
- Owners' name address(es) and Social Security Number(s)
- Payroll Reports and Copies of Employees' W-2's and/or 1099's
- Employee Names, Addresses and Social Security Numbers
- Bank Account Statements, Credit Card Statements and Cash Invoices for Items Purchased
- Home Based Business: Square Footage Used vs. Total Square Footage of Home
- Vehicle Used for Business: Account Numbers and Car Value, Auto Loans and Leases
- Miscellaneous Business Expenses(Cell Phone, Internet, etc)
- Business Asset Schedules
- Inventory(If Products Sold)
- Profit and Loss Statements

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