



What to Bring to your Business Tax Preparation Appointment

Please provide the following business documents:

- Previous Federal and State Tax Returns
- Bank account statement from last twelve months
- Profit and Loss, or Total Income and list of all Expenses (all expenses need to be supported by receipts)
- Balance Sheet, total Loans received and total Loans given (if applicable)
- State Excise Tax Return (if applicable)
- 1099INT - Interest Income
- 1099DIV -Dividend Income

If your business has employees, please provide the following from the current tax year:

- 940
- 941 Quarter 1, 2, 3 and 4
- W3, summary of all W2s
- 1096, summary of all 1099s