

A woman with long blonde hair and glasses is sitting at a desk, looking at a laptop. She is wearing a light-colored blazer. The background is a blurred office environment with other people. The image has a warm, brownish tint.

Gardner's Tax Service

CORPORATION AND LLC

TAX RETURN ITEM CHECKLIST

NEEDED ITEMS FOR BUSINESS TAX RETURN PREPARATION

As you begin to organize your documentation for your business tax return preparation and filing, we would like to provide you with this checklist. Please verify completion of necessary items before submitting for review, preparation and filing of business tax return.

- Quickbooks file. *(if available)***
- Profit and Loss. *(if Quickbooks file is not available)***
- Balance Sheet. *(if Quickbooks file is not available)***
- General Ledger. *(if Quickbooks file is not available)***
- Copies of all W2's issued to employees and officers.**
- For shareholders/LLC members – please ensure we have the correct mailing address for business owners.**
- Please ensure we have the correct business address, mailing address, email, and phone number for the company.**
- Copies of W9's with amounts to report on Form 1099 if you would like us to prepare and file 1099's for you.**

Tax season gets extremely busy beginning the last week of January and continues through the end of April. We will always make time for our business clients and respectfully ask that if you have the information needed to prepare your company tax return available, that you submit to us as soon as possible.

Please let us know if we can be of any assistance. We look forward to working with you soon!

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