



## Client Checklist – Business

Please mark if applicable & attached

- EIN: \_\_\_\_\_
- BIN: \_\_\_\_\_
- Organizational Documents
- QuickBooks
- Year-End Documents
  - Bank Statements
  - Inventory
  - Asset/Equipment Purchase Documents
  - Credit Card Statements
  - Loan Balances
  - 1099's Received
  - List of Repairs
  - Mileage
  - Officer Salary
- Payroll Information
- ACA Compliance Form
- Basis Schedule (S Corporations & Partnerships Only)
- Ownership Changes: \_\_\_\_\_
- Other: \_\_\_\_\_

### Notes/Comments

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**Due Date for Info Returned to DPW:** \_\_\_\_\_