



2 Centerpointe Drive, Suite 345 Lake Oswego, OR 97035
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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

Due Date for Info Returned to DPW: _____