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WORKING WITH YOU

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FY 2024

Business Taxpayer Abbreviated Checklist

Entity Name(s): _____

*****SOME TAX DOCUMENTS ONLY AVAILABLE ONLINE**

MOST COMMON TAX ITEMS- SEE DETAILED CHECKLIST FOR COMPREHENSIVE LIST

Document Request	Applies
Invitation to access Quickbooks Online, QB Desktop, or Excel schedule	<input type="checkbox"/>
Copy of December 2024 bank reconciliations with copies of December 2024 bank statements	<input type="checkbox"/>
Copies of invoices supporting all fixed asset additions from 1/1/24 until 12/31/24	<input type="checkbox"/>
Supporting details for any fixed asset disposals from 1/1/24 until 12/31/24	<input type="checkbox"/>
Copy of credit card statements that include the balance as of 12/31/24	<input type="checkbox"/>
Copies of sales tax filings from all states for the tax filing period ended 12/31/24	<input type="checkbox"/>
Accrued Simple Plan and withholding, if any	<input type="checkbox"/>
Copies of any new loan agreements entered into during 2024	<input type="checkbox"/>
Copies of federal and state quarterly payroll tax reports	<input type="checkbox"/>
Schedule of business expenses paid personally, if not already booked	<input type="checkbox"/>