

Please provide us with the following tax documentation:	
	<b>Financial statements, business income and expenses and/or a trial balance for the fiscal year</b> <input type="checkbox"/> We will/ have invite(d) Roberts Accounting to our online accounting platform. <i>Accounting Platform(software):</i> _____ <input type="checkbox"/> We use a desktop accounting software and will provide Roberts Accounting with an Accountant's copy. Software: _____ <i>Version:</i> _____
	<b>Year-End Payroll Documents</b> ( <i>Company Wide W-2s, Quarterly and Year-End Tax Returns</i> )
	<b>All bank account statements showing the balance as of December 31</b> ( <i>or the last day of the business fiscal year</i> )
	<b>All credit card account statements showing the balance as of December 31</b> ( <i>or the last day of the business fiscal year</i> )
	<b>All loan account statements showing the balance as of December 31</b> ( <i>or the last day of the business fiscal year</i> )
	<b>Details of assets purchased during the fiscal year</b> ( <i>invoice, etc. for buildings, equipment, furniture, intangible assets</i> )
	<b>Inventory value as of the last day of the fiscal year:</b> \$ _____
	<b>Sales Report from POS system for entire fiscal year</b>
	<b>Details on any ownership changes that took place throughout the year</b>
	<b>If we are preparing your business tax return for the first time, please provide corporate formation documentation</b> ( <i>EIN letter, Articles of Incorporation, Bylaws/ Partnership Agreement, S-Corporation election letters, etc.</i> )