What to Send: Businesses

Your business tax document checklist from Landers Accounting & Tax Service

Gather what applies to you, then upload everything securely through the client portal. If you are not sure whether something counts, send it anyway and note it for the office.

Business basics

- ☐ EIN letter for the business
- ☐ Formation documents and any ownership changes, if you are a new client
- ☐ Last year's business return (Form 1120-S, 1065, or 1120), if you are a new client
- ☐ S corporation election acceptance letter, if you have one

Financial statements

- ☐ Profit and loss statement for the full year
- ☐ Balance sheet at year end
- ☐ Business bank statements for all accounts, full year
- ☐ Business credit card statements, full year
- ☐ Loan statements for business loans or lines of credit

Income records

- ☐ Forms 1099-K and 1099-NEC the business received
- ☐ Sales summaries from your point of sale or invoicing system

Payroll

- ☐ Payroll reports for the full year
- ☐ Quarterly payroll filings (Form 941) and year end W-2 and W-3 copies
- ☐ Records of payroll tax payments

Expenses and assets

- ☐ Rent or lease agreement for business space
- ☐ Insurance, utilities, and other major expense records
- ☐ List of subcontractors you paid, with the 1099 forms you issued
- ☐ Purchases or sales of equipment or vehicles, with dates and amounts
- ☐ Business mileage log, if a vehicle is used for the business
- ☐ Home office size and expenses, if you work from home

Owner items and payments

- ☐ Owner draws or distributions taken during the year
- ☐ Health insurance premiums paid through the business
- ☐ Retirement plan contributions for owners and employees
- ☐ Records of business tax payments made during the year, with dates and amounts, including any pass through entity tax payments

Questions about a document? Call 770-627-5255 or send the office a message through the client portal.