



**Tax Documents Checklist for Business Returns:**

- ✓ Check register
- ✓ Bank statements/credit card statements
- ✓ List of partners/shareholders. For each, please include the following:
  - Social security number
  - A current address
- ✓ Forms received such as:
  - 1099-MISC
  - 1099-K
  - 1099-DIV
  - 1099-INT
- ✓ Investment paperwork
  - Money Markets
  - IRA
- ✓ State business registration – CID# and PIN#
- ✓ SS-4 Letter (EIN)
- ✓ Copies of 1099 forms mailed
- ✓ Copies of payroll forms – if applicable
  - 941 reports
  - 940 report
  - UIA report
  - MI 5080/5081 reports
- ✓ Sales Tax reports – if applicable
  - MI 5080/5081 reports