



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