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Business Tax Appointment Checklist

NOTE: If we are filing, we are filing your personal taxes also,
please see Individual Tax Appointment Checklist under the
Resources Tab.

- **Business information -**
 - Last years income tax if you are a new client
 - Name, address, and EIN#
 - Date of Incorporation
 - Articles

- **Income Data Required -**
 - 1099s
 - Income and Expense Logs
 - Balance Sheet
 - Profit and Loss Statement